ISSN 2300–1682

Editorial office: Centre of Migration Research, University of Warsaw, Pasteura 7, 02–093 Warsaw, e-mail: ceemr@uw.edu.pl

Managing Editor: Renata Stefańska, *University of Warsaw, Poland*

Contents

Central and Eastern European Migration Review

Vol. 13, No. 1, 2024

Special Section

Articles

Central and Eastern European Migration Review
Received: 11 June 2024, Accepted: 30 June 2024
Vol. 13, No. 1, 2024, pp. 5–9
doi: 10.54667/ceemr.2024.11

— SPECIAL SECTION —

Editorial Introduction: Migration Dynamics, Trajectories and Policies in the Context of Russian Full-Scale Aggression against Ukraine

Marta Jaroszewicz*, Oksana Mikheieva**

This editorial introduction sets the scene for the second part of the Special Section devoted to studying the multi-faceted migration-related consequences of the Russian full-scale invasion against Ukraine of 24 February 2022. Different kinds of migration, migration policies, practices of assistance and solidarity and also experiences of discrimination and exclusion happening in the aftermath or in the context of the Russian aggression against Ukraine after 24 February 2022 – whether inside Ukraine, in neighbouring states or globally – remain within the scope of both parts of this Special Section, with the first part having been published in June 2023.

Keywords: Ukraine, Russian aggression, forced migration, migration policies

* Centre of Migration Research, University of Warsaw, Poland. Address for correspondence: m.jaroszewicz@uw.edu.pl.
** DAAD Visiting Professor, Faculty of Cultural Studies European University Viadrina, Frankfurt (Oder), Germany. Address for correspondence: mikheieva@ucu.edu.ua.

Forced migration from Ukraine in the third year of war

On 24 February 2022, Russia launched an all-out invasion of Ukraine by land, air and sea, the biggest attack by one state against another in Europe since World War II. The assault included heavy air strikes against Ukraine's capital city – Kyiv – and simultaneous land attacks at all Russian–Ukrainian borders. Particularly dangerous from the point of view of civilian casualties was an unexpected attack from the territory of Belarus, directly threatening the capital city and heavily populated neighbouring regions. The Russian army soon changed its military tactics and started using regular night-time air strikes on major cities, with the use of drones and land- and aviation-launched cruise missiles. In what is now the third year of the full-scale war, apart from heavy military battles in the Ukrainian eastern regions, air strikes on Ukrainian cities have started to focus on the energy infrastructure, which resulted in severe power outages to both public institutions and individual households across the country. Within the first 7 weeks of the war, the Russian invasion forced 4.6 million refugees to flee the country and displaced more than 7.1 million people within Ukraine (UNHCR 2022). Over time, these trends have stabilised and many people returned home, particularly in spring 2022. As of 13 June 2024, there were almost 6 million Ukrainian forced migrants recorded in Europe and more than 500,000 recorded outside (UNHCR 2024).

The more time passes since the eruption of armed conflict, the more profound are the processes of adaptation of migrants to their new realities and the efficiency and fairness of the policies undertaken. Russia's full-scale war unleashed room for different practices of solidarity, networks of heterarchical societal self-help, volunteering for the war effort and assistance for civilians struggling with the war both within Ukraine and in neighbouring countries. However, over time, there was a growing fatigue with the social burden of resettlement in the host communities (Grabowska 2023; Moise, Dennison and Kriesi 2023). This weariness may be actively used in populist anti-migrant rhetoric and may influence the dynamics of domestic policies in European Union countries (Hooghe, Marks, Bakker, Jolly, Polk, Rovny, Steenbergen and Vachudova 2024; May and Czymara 2024). At the same time, we see the anxiety and psychological and physical exhaustion of the women, who comprise the vast majority of forced migrants, because of the lack of a clear perspective for the future, either in the destination country – which usually offers only temporary protection – or in Ukraine, where basic security is still a challenge.

Yet there is a growing plethora of coping strategies used by migrants, which usually involve transnational activities, including circular migration. In June 2024, the Council of the European Union extended the duration of the Temporary Protection Directive (TPD) granted to forced migrants from Ukraine for a further year, up to and including 4 March 2026 (Council of the EU 2024). Finally, further migration trajectories of Ukrainian migrants within the EU may, over time, fit better into the scheme of internal mobility as, also in June 2024, the EU opened accession talks with Ukraine.

Setting the scene for this Special Section

This editorial introduction sets the scene for the second part of the Special Section devoted to studying the multi-faceted migration-related consequences of the Russian full-scale invasion against Ukraine of 24 February 2022. Different kinds of migration, migration policies, practices of assistance and solidarity and also experiences of discrimination and exclusion happening in the aftermath or in the context of the Russian aggression against Ukraine after 24 February 2022 – whether inside Ukraine, in neighbouring states or globally – remain within the scope of both parts of this Special Section, with the first part having been published in June 2023 (Mikheieva and Jaroszewicz 2023).

Several months after the eruption of full-scale aggression – and in a bid to address the unprecedented migration consequences of military aggression – the Central and Eastern European Migration Review announced a call for articles for a Special Section on the consequences, trajectories, policies, discourses on war and displacement, emergency practices and other aspects pertaining to the migration and resulting from the Russian illegal war against Ukraine. Neither the CEEMR editors nor the Special Section editors deliberately stipulated any particular topics for possible contributions, leaving to the authors the choice of subjects, approaches and methods. On an epistemological level, however, the Special Sections' purpose was to offer a voice to research that is context-specific and based on a thorough knowledge of Ukraine and the wider region of Central and Eastern Europe, as well as the political, social and economic context of the countries that have accommodated Ukrainian forced migrants. The overall aim of the Special Sections was to cure existing blind spots in global migration knowledge production, which still lacks diversified research on Ukrainian migration (Düvell and Lapshyna 2022; Jaroszewicz, Grzymski and Krępa 2022). The interrelated, more emancipatory, goal was also to give a voice to those experiencing the war and its consequences, either directly or via specifically targeted research. It also aimed to bring into public discourse the voices of the host communities, which are often omitted, marginalised and sidelined in the study of migration. However, their reaction to the situation of forced migration is important, both from the point of view of the moral and psychological atmosphere of migrants' stay in host communities and from the point of view of the impact of the situation itself on the transformation of host communities and state institutions in the long term.

Introducing the papers

This Special Section presents 3 articles examining both the individual experiences of forced migrants on the one hand – by portraying the testimonies of children who were forced to flee Ukraine due to the armed conflict – and the collective ones on the other, i.e. the informal practices of hosting refugees and the local official responses to the arrival of forced migrants.

The first article, by Lucie Macková – from Palacký University Olomouc – and Andrea Preissová Krejčí – from the Silesian University in Opava, examines the very delicate topic of researchers' positionality in exploring such sensitive issues as the impact of forced migration on the identity of children forced to leave Ukraine and settle in the Czech Republic. The article is based on the stories of 22 children from Ukraine who, while spending time attending daily children's' clubs in 2 Czech localities (where one of the authors volunteered) were invited to write about their lives. The authors conducted a narrative analysis of the life stories of those children willing to participate in this research. The research was granted ethical clearance and followed the UNICEF procedure on ethical standards in research, evaluation, data collection and analysis. The empirical study was supplemented by the historical analysis of stories written by child refugees who experienced war in the former Yugoslavia. Through the detailed analysis of the children's stories, the authors reveal that many children spoke of feeling fear and of witnessing war first-hand. Being in exile, children still feared for their families and friends who stayed in Ukraine. They also expressed their feelings about their home country very strongly, both at the personal and at the more general level – as well as from a sense of patriotic obligation. Social networks that span multiple countries, together with education and leisure time in their new places of residence helped them to overcome the war-related stress and the anxiety stemming from forced migration. The authors conclude that children's agency and their embeddedness in wider transnational networks should be considered by both parents and guardians as well as by the institutional educational offer prepared by the countries of residence. The study of children's perspectives on war and forced migration offers opportunities for the development of well-adjusted policies and competences in working with children and families, both in informal meetings in clubs and in educational institutions.

The next article offers us a different starting point in the perception of forced migration and its consequences. The main focus when reconstructing the complex social texture of interactions between migrants and host communities is on the experience of Polish hosts who voluntarily accepted forced migrants from Ukraine. The article by Kamil Łuczaj from the University of Łódź, based on individual in-depth interviews with Polish hosts in the Podkarpackie voivodeship who invited Ukrainian refugees to live in their homes, shows that hospitality in the migration context is a multi-dimensional phenomenon that required emotional labour and other uneasy decisions and is somewhat unsustainable in the long-term; however, such hospitality may alleviate short-term accommodation needs in the case of mass displacement. Yet, as the author underlines, the relationship between hosts and guests was not always tense as such but was often somewhat complicated. Such an encounter in the space of the home activates issues of independence, gender, social class and language and necessitates the greatest amount of negotiation, as well as generating doubts and a rethinking of the situation on the part of the hosts themselves. This complexity clearly demonstrates that offering voluntary accommodation assistance to forced migrants is an extremely important part of the immediate response to a humanitarian crisis – but cannot realistically be considered as a long-term solution.

The final article, prepared by Wiktor Magdziarz, analyses the changes in the policies and practices of Polish local governments in the system of public policies addressing the needs of forced migrants in Poland. In his solid study of local responses based on both legal acts and expert interviews, the author argues that local governments' engagement in the reception of migrants from Ukraine increased significantly. Magdziarz discusses the dynamics of local policies by applying a multi-level governance (MLG) framework for migration policy analysis. The cities' endeavours during the humanitarian emergency – such as communication activities, lobbying, the building of capacity based on the mobilisation of inter-institutional networks, increased engagement in the implementation of state policies, the upscaling and development of local migration policies, as well as involvement in a wide range of ad-hoc humanitarian initiatives – led to a temporary extension of local governments' functional role, while their structural position vis-à-vis other policy stakeholders was redefined. However, since these changes were mostly of an ad-hoc nature and also included strong cooperation with NGOs and humanitarian organisations, it is not clear whether the role of local governments in Poland in migration management has actually extended substantially in the long term.

Conflict of interest statement

No conflict of interest was reported by the authors.

ORCID IDs

Marta Jaroszewicz https://orcid.org/0000-0001-7521-6779
Oksana Mikhaieva https://orcid.org/0000-0002-3789-2415

References

Council of the EU (2024). *Ukrainian Refugees: EU Member States Welcome the Proposal to Extend Temporary Protection*. https://www.consilium.europa.eu/en/press/press-releases/2024/06/13/ukrainian-refugees-eu-member-states-welcome-the-proposal-to-extend-temporary-protection/ (accessed 30 June 2024).

Düvell F., Lapshyna I. (2022). On War in Ukraine, Double Standards and the Epistemological Ignoring of the Global East. *International Migration* 60(4): 209–212.

Grabowska I. (2023). Societal Dangers of Migrant Crisis Narratives with a Special Focus on Belarussian and Ukrainian Borders with Poland. *Frontiers in Sociology* 7. https://doi.org/10.3389/fsoc.2022.1084732.

Hooghe L., Marks G., Bakker R., Jolly S., Polk J., Rovny J., Steenbergen M., Vachudova M.A. (2024). The Russian Threat and the Consolidation of the West: How Populism and EU-Skepticism Shape Party Support for Ukraine. *European Union Politics*. https://doi.org/10.1177/14651165241237136.

Jaroszewicz M., Grzymski J., Krępa M. (2022). The Ukrainian Refugee Crisis Demands New Solutions. *Nature Human Behaviour* 6: 750.

May A., Czymara C. (2024). Adopting Far-Right Rhetoric Increases Far-Right Votes. *Social Europe*, 23 February. https://www.socialeurope.eu/adopting-far-right-rhetoric-increases-far-right-votes (accessed 17 June 2024).

Moise A.D., Dennison J., Kriesi H. (2023). European Attitudes to Refugees after the Russian Invasion of Ukraine. *West European Politics* 47(2): 356–381.

Mikheieva O., Jaroszewicz M. (2023). Editorial Introduction: Migration Dynamics, Trajectories and Policies in the Context of Russian Full-Scale Aggression against Ukraine. *Central and Eastern European Migration Review* 12(1): 115–126.

UNHCR (2022). Operational Data Portal. Ukraine Refugee Situation (2022). https://data2.unhcr.org/en/situations/ukraine (accessed 30 June 2023).

UNHCR (2024). Operation Data Portal. Ukraine Refugee Situation. https://data.unhcr.org/en/situations/ukraine (accessed 30 June 2024).

How to cite this article: Jaroszewicz M., Mikheieva O. (2024). Editorial Introduction: Migration Dynamics, Trajectories and Policies in the Context of Russian Full-Scale Aggression against Ukraine. *Central and Eastern European Migration Review* 13(1): 5–9.

Central and Eastern European Migration Review
Received: 17 October 2022, Accepted: 28 November 2023
Published online: 15 December 2023
Vol. 13, No. 1, 2024, pp. 11–24
doi: 10.54667/ceemr.2023.28

Lessons Learnt? War, Exile and Hope among Child Refugees in the Czech Republic

Lucie Macková*, Andrea Preissová Krejčí**

This study describes the experiences of child refugees from Ukraine residing in the Czech Republic and sheds light on the perception of their situation. Our research is based on selected stories of 22 children from Ukraine – who wrote down their experiences of the war – and additional sources containing children's memories of the war from other contexts and historical periods. Using qualitative analysis of their narratives, we look at their life stories, which we have recorded, code, and sorted into analytical categories. The results indicate children's agency and the importance of their social relations. Moreover, we stress similarities with other refugee situations from the past that led to shaping children's identities. Attention should also be paid to the importance of children's vulnerabilities and special needs in refugee situations, especially when it comes to securing their emotional needs and education.

Keywords: child refugees, exile, trauma, identity, Ukraine

* Department of Development and Environmental Studies, Faculty of Science, Palacký University Olomouc, Czech Republic. Address for correspondence: lucie.mackova@upol.cz.
** Faculty of Public Policies in Opava, Silesian University in Opava, Czech Republic. Address for correspondence: andrea.preissova@fvp.slu.cz.

Introduction

Throughout history, children have been involved in many refugee situations and represent an under-researched group of people who deserve further attention due to their unique characteristics. Our research unravels the current Ukrainian refugee situation in the Czech Republic through the eyes of children and adolescents. We follow their narratives as they discuss their lived experience of the war and emigration, followed by their future aspirations. Based on the experiences recorded by refugee children from Ukraine, who were driven from their homes at the beginning of the full-scale Russian aggression against Ukraine, we analysed the key themes experienced during their resettlement and compared them with problems that are repeatedly described in the literature about refugee children from other historical periods.[1] In this study, we look at refugee children from former Yugoslavia in the Czech and Slovak Federal Republics. We analyse the ways (if any) in which the child refugee experience differs in the various contexts. To do this, we use children's written narrations of their experiences with the war – in this way, we might use it as a stepping-stone to better address their needs.

The Czech Republic has registered more than 500,000 refugees from Ukraine (UNHCR 2023); however, it is estimated that the current numbers are lower, as about one-third of the refugees returned to Ukraine (MVČR 2023). Refugee children represent more than a fourth of all Ukrainian refugees in the Czech Republic (MVČR 2023). The Czech Ministry of Education recorded 57,000 children registered in schools (including kindergartens and elementary schools) for the school year 2022/2023 (MŠMT 2022). However, research has shown that not all children attended educational institutions and attendance was generally lower among older children (16+ years) and children living in Prague and Central Bohemia, which host larger numbers of refugees (PAQ Research 2022). Their numbers slightly decreased in March 2023 to 51,000, with the largest share of children attending elementary schools (MŠMT 2023).

The war through the eyes of children has been recorded by ethnologists, anthropologists and historians in the past. For example, Povrzanović (1997) inquired about the formation of the ethnic and national socialisation of children, using the example of Croatian (and Bosnian) children in the 1990s, whose development was disrupted by the war and in which ethnicity played a significant role. Povrzanović draws attention to the fact that displaced and refugee children have acquired a maturity that is not usual for their age (Povrzanović 1997). In our paper, we showcase the experience of refugee children from Ukraine. We also focus on the psychological consequences, for children, of fleeing war zones and the specifics of working with these young people.

Next, we turn to the literature on child refugee integration, the identity formation of refugee children and the impact this experience has on children's future development. We also discuss the trauma that can affect refugee children and how their refugee experience differs from the stories shared by the Ukrainian refugee children staying in the Czech Republic. The analysis is divided into 3 parts to reflect key themes emerging from children's experiences of witnessing war and being refugees. The following themes are (1) the war experience, (2) the exile and (3) the aspirations and hope. In the discussion, we also discuss the experiences of refugee children from other European countries, as we draw parallels in their stories. While we are aware that there are more child refugees outside of Europe and it would be worthwhile looking at their experiences, we nevertheless decided to stay with the European context. Finally, we conclude by summarising the child refugees' experiences, which might differ in the details but which share specific characteristics in many different contexts.

Theoretical background

There is a difference between autobiographical and collective memory for people who have learnt about events indirectly (Nets-Zehngut 2011). Some refugees might be too young to remember their journeys, yet might be affected by the experience. Wylegała (2015) points to the fact that there is a difference between children who migrated as teenagers and small children who might be more affected by the transfer of familial memories. Teenage refugees might be more acutely aware of the changes taking place. In one study, refugee adults reported that they felt confused by the conflict that took place when they were young because it was difficult for them to understand the social and political reality at that time (Wylegała 2015). At the same time, the refugee experience can affect a person's identity for both child and adult refugees. Previous research on refugees discusses various themes relating to their changing status and differences in identity (Khan, Kuhn and Haque 2021). Many refugee youth attach importance to their past identity (Chen and Schweitzer 2019) and might find it problematic to re-enact their identity in line with their host environment (Wylegała 2015). Wylegała (2015) also claims that refugee children were more likely to face peer pressure and, unlike adults who felt proud of their identity, faced adversity due to differences in language or traditions.

There are different ways in which trauma can manifest itself in child refugees. In order to deal with it, some therapies involve story-making, such as narrative therapy, testimony therapy and other techniques (Lustig and Tennakoon 2008). Kevers, Rober and De Haene (2018) focused on the co-construction of silence and speech in refugee narrations; protective silencing was also often found in refugee families. Therefore, silence can be as important as narration. Currently, there is a shift towards inquiring about refugee well-being, incorporating both the experience of exile and the war-related experiences (Miller, Worthington, Muzurovic, Tipping and Goldman 2002). Miller *et al.* (2002) inquired about the different exile-related stressors for adult refugees and found that a lack of adequate housing or income for the basic necessities influences their children in a negative way. In some cases, refugee children are forced to take responsibility – which is uncommon at their age – and to show further agency by supporting their parents emotionally or in other ways. Hence, it is important to note that the refugee experience might be even more difficult than living through the war. Research has indicated that displaced children who returned to Croatia after the war showed more symptoms of post-traumatic stress disorder (PTSD) than those who experienced the war at home (Papageorgiou, Frangou-Garunovic, Iordanidou, Yule, Smith and Vostanis 2000). It depends on the coping mechanisms and support networks which the children might have – it might be more difficult to leave the country without having any of them.

Interestingly, some younger refugees spontaneously recalled traumatic memories, even though they were not directly exposed to the events but only knew them from the stories of others (Hollo 2020). Therefore, children can also have a variety of feelings associated with the conflict. The psychological impact of war, especially on vulnerable persons, including children, is widely known and well-documented (Danforth 2003; Danforth and Van Boeschoten 2012; Goldin, Levin, Persson and Haeggloef 2003; Knezivic and Olson 2014; Papageorgiou *et al.* 2000). Many children experience PTSD, often 'followed by depression, recurring nightmares, insomnia, chronic hyperactivity, concentration disorders and irritability' (Knezivic and Olson 2014). The authors also add that the lifetime prevalence of PTSD in specific groups of people who have experienced trauma ranges between 15 and 24 per cent (Knezivic and Olson 2014). Research has found a connection between the intensity of wartime traumatic experiences in children and intrusive (bothering) memories and their avoidance (Papageorgiou *et al.* 2000). Therefore, the integration of child refugees can be made more difficult by the trauma to which they have been subjected.

We understand 'integration' as the most common way of referring to migrant adaptation processes, not only when talking about normative dimensions but also when discussing migrants' own experiences (cf. Erdal and Oeppen 2013). The integration of child refugees might include them learning the language or obtaining an

education in the country of settlement but does not exclude contacts with the country of origin. Research has shown that education is crucial for refugee and immigrant children's adaptation and socialisation (Hones and Cha 1999). Moreover, education can also help their social and emotional healing (Eisenbruch 1988; Lustig, Kia-Keating, Knight, Geltman, Ellis, Kinzie, Keane and Saxe 2004). While the psychological impact of forced migration is not the main crux of our research, it is still important to bear it in mind in order to understand the wider context of the forced migration experience among children and to be mindful of it when researching with child participants. Next, we turn to the methods used in our research and our ethical concerns when working with children.

Method

We have used a qualitative research strategy for this research (Denzin and Lincoln 2011), which was conducted with child refugees from Ukraine, who arrived in the Czech Republic between 25 February and the end of June 2022. The children were asked to write about their life. Many children wrote about the war, which affected their lives, including their journey to the Czech Republic and the post-migration experience. We used a narrative analysis (Webster and Mertova 2007) and coded their life stories. After categorising them, we created an analytical story to formulate the key statements that emerged from the categories and the relationships between them. For our paper, we use 22 collected stories. In total, we collected 42 narratives but, for the purposes of this article, we only worked with those that offered a longer coherent story. The children and adolescents lived in two different regions of the Czech Republic (the Olomouc Region and the Central Bohemian Region) and their ages ranged from 7 to 18 years. The narratives are consistently anonymised and we only use gender and age to characterise them. In some cases, children and young people wrote their age in their stories. If we do not know the exact age, we distinguish an age range (e.g. lower-primary-school age at 6–11 years and upper-primary-school age at 12–15 years). In total, there are stories written by 15 girls and 7 boys – among whom 7 girls up to the age of 11 and 8 over 11 years; there are 7 boys under the age of 11.

The stories of Ukrainian refugee children were collected between May and July 2022 in children's clubs that were used as spaces for children's activities before the majority of them enrolled in schools in September 2022. In these spaces, often run by non-governmental organisations, they could play games or attend Czech language classes. The parents and children were informed about the ongoing research by the educators, our gatekeepers, one day in advance and the researchers (with the help of our Ukrainian colleagues) informed them about it once again on the day when our research in the given institutional setting took place. The stories were collected in a group setting with prior written parental consent and the children's assent (the child's affirmative agreement to participate in research, which was oral). Children could withdraw from the study at any time and did not have to participate (without any ramifications on the provision of services by the children's clubs). The children could decide about the timing of the narrating of their stories and could do so with their parents being present in the morning or later during the day. They had a right not to participate in our research or to withdraw at any time and all standard ethical considerations while researching with children were taken into account.

We followed the UNICEF (2021) procedure on ethical standards in research, evaluation, data collection and analysis and we consulted Alderson and Morrow's (2020) book on the ethics of research with children and young people. The research was approved by the Ethics Committee of the Faculty of Science, Palacký University Olomouc (Ref. No. 23-02). We understood that recalling the outbreak of the war and subsequent forced migration might provoke emotional responses. Therefore, in line with the recommendations of other research (Helseth and Slettebø 2004), children and their families had the possibility to attend a follow-up consultation with a trained psychologist working closely with the children's clubs. Involving children in research requires special attention regarding their vulnerability and informing them about the research details

in a way that they can understand (Helseth and Slettebø 2004). Therefore, we made sure that the task for children and the aims of our research were explained in an age-appropriate way and that they had an opportunity to ask questions about it.

Finally, we also used some recorded testimonies of children fleeing the conflict in the former Yugoslavia to shed light on child-refugee experiences in general. These testimonies appeared on the pages of the children's magazine *Our Corner* (*Náš koutek*) in 1991 and 1992. The magazine was published on the territory of the former Yugoslavia by the Czech diaspora (in Czech) and it is a unique historical source conveying authentic and immediate testimony about the horrors of war in the 1990s. *Our Corner* magazine provided a space for sharing the experiences and memories of children who were evacuated to the Czech Republic during a critical period, thanks to which today's researchers can see the emotions and inner experiences of children affected by the war over time. More than 1,000 children from Daruvar were separated from their parents and evacuated to reception facilities in the Czech Republic, where they remained for nearly 5 months (Preissová Krejčí and Kočí 2020). However, there was no discussion about integration as it was presumed that the children would return back to their parents – which they eventually did. *Our Corner* became a direct intermediary between children and their parents as it shared their stories across the borders. The children's narratives we use to illustrate their situation are also taken from a magazine but are authentic to the period and written by the children themselves. Therefore, we worked with them in a way similar to that used with the narratives we recorded (we coded and interpreted them).

We selected two groups of children who became refugees from a war conflict (the context of which differed), mainly at an age corresponding to primary- and secondary-school pupils. Both groups share authentic narratives and the place where they found their temporary residence – the Czech Republic. We acknowledge that there are limitations to the data and that there are difficulties in comparing both groups of children despite their being similar in age. The political context for both groups of refugee children differed and so did the historical period in which they lived. While the children from former Yugoslavia stayed with other children in temporary housing and returned after several months, the experience for many Ukrainian children is dissimilar. They might be more isolated from their peers but often have some family members with them. The children's purpose in writing the stories varied – in our case, children from Ukraine wrote the text for us as researchers whereas, in the case of children from former Yugoslavia, the audience was much wider and one of the purposes of the text was also to connect with others. While the children from Ukraine often came with at least one relative, this was not the case for children from the former Yugoslavia. Therefore, writing the text could serve as a tool to connect with their families and their stories could reflect this in a way that they could enhance some features while leaving out others. In today's world, thanks to interconnectivity, it might be easier to keep in touch with friends and relatives – and yet child refugees suffer from not physically being with them. Without claiming the universality of the child refugee experience, we want to highlight some similar aspects, despite the differences in both contexts.

Ukrainian children's narratives

The children's narratives, recorded in the form of written stories, can be divided into three main lines of narration. We acknowledge that migration 'presents itself as fragmented, non-linear, including different intermediate stops and multiple returns and new departures' (Triandafyllidou 2022: 3847). However, for analytical purposes and in line with children's stories, we decided to divide their narratives into three parts, which follow the pre-migration phase, the migration itself and the children's future return aspirations. In other words, we use the following three categories, (1) the reasons for leaving the country (war experience), (2) the exile and (3) the aspirations to return home. The journey to exile was often accompanied by the first realisation

of a change in the situation and initial adaptation; it is connected with experiences of war and fear, which either immediately complemented it or preceded it.

War experience

We turn now to the experience of war among child refugees, which is definitely an important factor in their further integration. We can say that their war and pre-war experiences influenced the children's settlement in the Czech Republic. Some stories share different aspects of the war and relationships with the country of origin. The beginning of the war was connected with an element of fear, surprise and injustice for some children – many children were surprised by the sudden onset of the war*:* 'I hate war! It is cruel. That shouldn't have happened' (boy, aged 10); 'I couldn't believe that it was all true, that the war had started…' (girl, aged 11); 'We didn't understand what was happening until we turned on the TV. And so we learned that the war had begun. And what was next? Like in a terrible dream – panic, fear, inability to accept reality' (girl, aged 11).

Some children, who did not leave Ukraine at the beginning, had to live through the war. Other than physical discomfort – like living in the basement – manifestations of the war were present in the daily lives of children such as this 8-year-old boy: 'I was very scared and cold. I covered my ears so I wouldn't hear the crash or feel the explosions'. The situation was difficult even for children who left Ukraine in the initial days of the war, such as this girl in lower-primary school:

> *The war began on February 24. We left for the Czech Republic on March 1. The whole days I spent in Odessa were terrible. I was scared when people outside were slamming doors, I thought those were explosions. Everything was fine in our city, but still it was terrible, because Kherson was bombed, so we thought that we would be bombed too.*

During the journey itself, many children experienced the perils of war, as recounted this upper-primary-school girl:

> *At that moment, mum decided that we would definitely leave. She called her cousin to prepare for the trip tomorrow. (...) We left the village on 5 March. At the station, someone sounded the siren and all the people started running. We barely got onto the train – it was full of people. As soon as we left, they started bombing the station. We drove 12 hours to Lviv. We were supposed to change to the Lviv–Uzhhorod train, but were told there were no seats. Often the siren went off. There were an awful lot of people there and mum got lost several times.*

Understandably, even at the time of our research, some children were still struggling with loud noises and other things that reminded them of the war, even while being safe, as this 15-year-old girl confirmed: 'Even though we have been in the Czech Republic for three months, we are still scared of any loud noise and airplanes above us'. The war left its marks and, while many refugee children had to say goodbye to their loved ones, some of them permanently: 'A couple of rockets flew through my town but it didn't seem to do much damage. In a week I found out that my dad is in heaven. I hate Putin. Ukraine must win' (girl, aged 11).

While children are usually seen to not understand the wider complexities of the conflict situations, some of them, like this 18-year-old girl, were acutely aware of the implications for the nation-state and understood the war in a wider geopolitical framework: 'It is the most difficult test for the nation'. Another girl, aged 10, noted: 'My homeland is Ukraine. The war on the territory of my state has become a great suffering for me. (…) I lived in the basement of my school for a week. (…) That was in Kyiv. My mum is in the army'.

The war was something unreal or unexpected for many children – they struggled during the war and may still have difficulties with living in their new country of settlement because of their war experiences. Moreover, the relationship to their country of origin has also been highlighted in some of the stories, with one girl even stressing that the war was a 'test for the nation'. However, it needs to be acknowledged that some of those ideas might have been adults' opinions, overheard and repeated by the children. Next, we turn to the children's experiences of life in exile.

Exile

The children recall the events and, in many narratives, the date of 24 February is mentioned explicitly. Some of the children and their relatives started packing on that day and left for safer areas, sometimes outside Ukraine. This date represents an abrupt change in respondents' lives, as confirmed by this 10-year-old boy: 'After that, mum quickly packed us up in a few minutes, dad took us somewhere on a bus and we left for the Czech Republic'.

The narrative of change and disruption is clear in the narratives, as stated by this girl, aged 11: 'One morning I woke up and heard from my mother that the war had started. That's when my world turned upside down'. For many children, their plans for their future studies went awry, as for this girl, aged 11:

> *When the war started, I was preparing to go to art school. At that time dad was sitting and watching the news. I learned from him that the war had started. Within days, dad said we had to leave the country. I hoped that this would not happen but, very quickly, we found ourselves in the city of Mladá Boleslav. Later we moved to the city of Olomouc.*

Therefore, the experience of before and after the war is particularly stressed and there is some decoupling between these two worlds. For some children, the migration experience took place without their parents, who stayed in Ukraine and, therefore, the change was even more disturbing and profound. Most children had left at least 1 parent behind due to the ban on travel for men of working age. The children were forced to 'grow up' and take further responsibility in their families. Children were also worried and anxious about their relatives remaining in Ukraine. Two girls, of upper-primary-school age and 13 years old respectively, had to leave both parents behind, which represents a profound change in their familial situation. 'I am very worried about my parents, who stayed in Ukraine'; 'Unfortunately, my mum stayed in Ukraine because she decided to stay close to my dad'. For many child refugees, the experience of being uprooted from a familiar environment is deeply unsettling. In their minds, they prefer to keep a connection with Ukraine that involves their social networks but also familiar places, as experienced by this 7-year-old boy: 'This war separated me from my dad and my city. It took away my classmates and first year of school'. Many children, like this boy aged 8, do not see the whole situation as something they would choose for themselves: 'We moved to the Czech Republic and I don't want to be here, I don't want to learn a foreign language. I want to be at home in Ukraine'.

Some stories represent a mix of different feelings. While children often mourn what they had left behind, they also show appreciation of the new situation and thank people or institutions in the Czech Republic. Some stories, like that of a 13-year-old girl, also offer a glimpse of positivity: 'I went to school in the Czech Republic with my brother. I really liked it there. I made friends'. In general, the presence of family members and other close persons is definitely advantageous in the migration process. Social networks play a role in refugee children's embeddedness in the new place of residence. While many children mention friends, family or even pets who remained behind, some stories also appreciate the new connections and friends they had already made. It also seems that friendships and family links in Ukraine will stay strong due to frequent communication

with the country of origin. As many children had only been in the Czech Republic for a short period at the time of our research, it is understandable that most stories do not mention new friendships forged in the Czech Republic. However, gratefulness towards the country of refuge is a recurrent theme in many narratives, as are hopes of a Ukrainian victory and return.

Hope and return aspirations

The aspiration to return retains strong transnational connotations, as children hope to be simultaneously 'here and there' and have a 'home away from home' (Vertovec 1999, 2004). Interestingly, none of the children's narratives mentioned that they would like to remain in the Czech Republic and all were hoping to return to Ukraine. However, our research took place shortly (weeks or months) after their arrival, so it is possible that the preference might have changed for some with their increasing length of stay – some might have even returned. Returning home is a category developed by a series of stories that converge in the lived fear and anticipation of returning and being reunited with family and friends. The strong transnational relationships with friends and family have been particularly highlighted in the following stories by 2 boys, the first 10 years old and the second of senior-school age: 'Now we have been accepted in the Czech Republic but I really want to return home to my friends'; '… with all my heart I wish to return home, where my grandfather, grandmother and little sister are with my family, all my dear and beloved family'.

However, some children, like this 12-year-old girl, acknowledged that their stay in the Czech Republic is longer than expected, due to the situation in Ukraine: 'Although the leaders assured us that we would return by 8 March, we have been here in the Czech Republic for 4 months and it is not known when we will return home, because rockets are still attacking Zhytomyr'. The issue of return is also deeply intertwined with wider geopolitical considerations and the hope for Ukrainian victory, as these 3 children testify: 'We will see victory and we will definitely go home' (girl, aged 15); 'But now the situation is better, so I hope we will go home very soon' (girl, aged 11); 'I hope that the war will end soon and we will return to our Motherland' (girl, aged 11).

All the children expressed their aspirations to return to their country of origin. While some children, like this boy aged 8, wanted to appear strong in their narratives, they nevertheless wanted to return: 'I'm not afraid of anything because I'm a fearless fighter but I want to go home'. All of these narratives show a strong sense of hope instilled in children who wish to return back to their country of origin. Next, we turn to children's narratives of another refugee situation from the 20th century.

Comparison with the situation of child refugees from former Yugoslavia

Testimonies of children were also written in earlier refugee situations. For the needs of our comparison, we chose children who fled the civil war in Yugoslavia to the territory of the Czech and Slovak Federal Republic more than 30 years ago. The children from former Yugoslavia wrote their stories in the *Our Corner* (*Náš koutek*) magazine (for more on this issue see Preissová Krejčí and Kočí 2020). Both refugee groups have in common the fact that they found a temporary home on the territory of the Czech and Slovak Federation – or, later, the Czech Republic – and that they left many of their friends and family members in their countries of origin. Child refugees from former Yugoslavia started to make new friends and relationships in the Czech Republic, primarily with other refugee children. These children, too, could not wait to return home and meet those they left behind. These two processes of adaptation to a new environment and forging new connections are not in conflict and indicate a similar experience for both groups of refugees. The following statements or quotes from children in both refugee groups document the acquisition of new social ties. Children from former Yugoslavia wrote at that time: 'I made a lot of friends in Janské Lázně. We had a good time there. (...) Even

today, I remember the beautiful days in Janské Lázně and all my friends'[2]; 'Last autumn, I spent 3 months in Janské Lázně. Even today, I remember our company at table number 43. (…) What are brothers Tony and Dalibor doing now and will they ever remember?'[3] Children from Ukraine, like these boys aged 9 and 8 respectively, noted: 'So we went to the Czech Republic. Now I have many friends and a good teacher in the Czech Republic. And no war!'; 'I already have many friends in the Czech Republic. I like the city of Olomouc'.

We discussed the hope to return home in the previous section, as expressed by many Ukrainian children. By the same token, Ukrainian refugee children note feelings of homesickness or nostalgia for their country of origin: 'When there was no war, we had a good time. I like Ukraine very much' (girl, aged 8); 'I'll say one thing about the Czech Republic – it's good here but it doesn't matter because I am sad for Ukraine' (girl, aged 11); 'Now I am in the Czech Republic and I hope that the war will end soon and everything will be as good as before' (girl, aged 15).

Child refugees from former Yugoslavia also expressed similar sentiments in their stories. The experience of being child refugees helped them to verbalise their love for their home, using patriotic statements: 'In my heart there is an indescribable love for my homeland'[4]; 'We live here but it's not like home. I often think that, once we return home, I will never want to travel again. I miss being there and want to go home. I have many friends here but I often think of Daruvar and am keen to return home'[5]; 'I really wish that next spring there would no longer be a war, so that we could live in peace and happiness again'.[6] While children from Ukraine were staying in the Czech Republic for a longer period of time, the return for most Croatian children materialised after several months – during February 1992.

Refugee children from both situations dreamed about returning to a place to which they felt that they belonged. While some children wish they could return to the place that they cherish in their memories, others understand that this place is no longer the one to which they can return because it no longer exists. There is a sharp contrast between the pre-war situation and the situation now and children recall the places in their memories. Two Ukrainian refugee children, a girl of 15 and a boy of 7, note: 'I am sad for Kharkiv. Kharkiv is an unusually beautiful city, which I associate with flowers, with the singing of birds in magical parks and with my female friends. After February 24, this city no longer heard birdsong, but explosions and gunfire'; 'My mother, younger brother and three sisters went with me. No one stayed at home and our house is no longer there. I wish you all the best'. Children from former Yugoslavia recalled: '… suddenly our house shook. It was a powerful explosion. I was very scared and started crying. When I got up in the morning, I saw that my friend's house had been demolished. Now my friend has nowhere to return to.[7] Older Ukrainian refugee children expressed statements in favour of a Ukrainian victory in the war: 'We will see victory and we will definitely go home. Our big thanks go to the Czech Republic. Everything will be Ukraine!' (girl, aged 15); 'I believe that everything will end with the victory of Ukraine. And we will be even better off than before. Everything will be Ukraine' (girl, aged 18); 'Ukraine will be a strong and great state' (girl, aged 15).

While we did not encounter similarly strong nationalist sentiments among the stories of children from former Yugoslavia, they are present in other accounts. For example, Croatian anthropologist Maja Povrzanović (1997: 84) describes the awareness of national identity among the children in Zagreb during the war:

> *In the summer of 1991, the 6-year-old daughter of my Zagreb colleague came home from kindergarten and asked: 'Mum, why should all Serbs be massacred?' Her mother is Croatian and her father is Serbian. When meeting a soldier in uniform, the 3-year-old daughter of another colleague shouted with joy: 'This is my Croatian homeland!'.*

The situation is difficult for the children of parents with different nationalities, especially if the countries are now the warring parties. As written in one 8-year-old Ukrainian boy's story: 'My dad is Russian and my mum is Ukrainian but I don't want to be Russian…'.

The war, the period of exile and the longing to return brought new experiences to refugee children. That of refugeehood is difficult to deal with for adults but can be even more stressful for children – regardless of the historical period in which they find themselves. Both groups of refugee children found new friends but this did not prevent them from longing for 'home'. Many child refugees from former Yugoslavia left without either parent and, while this is not the norm in the current Ukrainian situation, there are still some children who had to leave without their parents. Similarly, many child refugees from Ukraine had to leave their fathers behind due to the law in Ukraine. We see parallels in the narratives of child refugees – and not only in their longing for home and family. Children, many of whom are separated from their parents or siblings for the first time, see their future in peace after the war. Many of the children in both groups expressed strong feelings of nostalgia for their cities or countries of origin. However, they also realised that the places to return to might no longer be the same, as many of them witnessed their destruction before leaving.

Lessons learnt and conclusions

Pre- and post-migration experiences all impact on refugees' mental health as well as on the ways in which they think about their 'homeland' and sustain and forge new connections. Many children described their fear while being in Ukraine and their experiences of witnessing war first-hand. This latter and its implications increased the risk of the children experiencing a broad spectrum of direct and indirect burdens on their physical and mental health (Schwartz, Nakonechna, Campbell, Brunner, Stadler, Schmid, Fegert and Bürgin 2022). While it is not the ambition of this paper to discuss child refugees' mental health, some statements point to the difficult experiences through which the refugee children went. Even while being in exile, children still fear for their families and friends who remained in Ukraine. This is similar to the concerns of adult Ukrainians. Research shows that among the major concerns facing Ukrainian adult refugees are their 'fear for the fate of relatives who stayed in Ukraine', 'fear for [their] homeland' and their uncertainty about the return (Isański, Nowak, Michalski, Sereda and Vakhitova 2022). We have found similar issues faced by child refugees in their narratives, in which the words fear, being scared or worried appeared frequently.

The decision to migrate was not taken lightly by children's families. In our narratives, understandably, we saw that children did not have the decision-making powers about migrating but simply followed their families. While the children who fled former Yugoslavia often left without their families, this experience of being unaccompanied minors is rarer for Ukrainian children. Yet, most of them had to leave their fathers behind due to the current law in Ukraine. Authors – such as Bobrova *et al.* (2022) – discuss the decisions about relocation that were taken at the beginning of the conflict in Ukraine and show how they related to emotions. For some, the decision might include reconciling oneself to the migration situation while being aware of the risks of staying in Ukraine. However, others decided to leave, often framing the decision in terms of protecting the children. The risk of psychological impacts when fleeing war zones is significant and its impacts are higher for children who are more vulnerable than other refugee groups (Dangmann, Dybdahl and Solberg 2022; Fazel and Stein 2022; Hameed, Sadiq and Din 2018). However, leaving the conflict rather than staying in a familiar environment might still be the preferred option.

At the same time, children expressed strong feelings about their country of origin. The age might play a role for refugee children – as the older ones spoke of patriotic feelings in their narrations – but even younger children wrote that they 'liked' Ukraine or 'felt sad' for it. Importantly, children strongly expressed their wishes and preferences about their future return and thus expressed their migration aspirations. They understood the wider

implications of their refugee predicament and what led to it. The following quotation from an 11-year-old girl aptly summarises many issues that Ukrainian children face in the current situation: 'War is a 5-letter word [in Ukrainian]. But how many associations it awakens in us! Pain, heroism, patriotism, longing for loved ones, hatred and love'.

With refugee children being physically cut off from some of their friends and relatives in their countries of origin, they attempt to forge new connections and make friendships in their current predicament. While many Ukrainian children mention friends, family or even pets who remained behind, in some of their stories they also appreciate the new connections and friends they had already made. It is important to bear in mind the specific needs which children affected by conflict might have in the initial stages – as well as months and even years after the experience of relocation. Migration and life in exile have an impact on child refugees' feelings of wellbeing and affect how they perceive their country of origin. As seen in the children's narratives, many of them are resilient and perceptive about the whole situation – creating their own meanings of war and exile.

We analysed the written narratives of child refugees from Ukraine. We divided their narratives into different parts, including their war experiences, their exile and their aspirations to return. These children, whose experience we have shared, hoped to return 'home' soon. However, the longing for 'home' and their understanding of the relations between countries was a recurring theme. Children tend to realise their feelings for their country of origin and the people they had left behind. Similarly, we used the case of child refugees from former Yugoslavia to illustrate some similarities and shared problems for child refugees in the different historical periods. Many of these refugee children longed for 'home', friends and family and felt a strong attachment to their place of origin. While most children from former Yugoslavia returned after several months of exile, many Ukrainian children are still outside their country of origin and might remain there in the future. At the same time, children actively express their wishes about their future and their migration aspirations.

Acknowledgements

We would like to thank our respondents and their parents for allowing us to read their stories. We would also like to thank Dr Uljana Cholodová and Prof. Lyudmila Chyzhevská for their help with collecting the stories and Jasna Mičianová for translating them from Ukrainian to Czech.

Conflict of interest statement

No conflict of interest was reported by the authors.

ORCID IDs

Lucie Macková https://orcid.org/0000-0002-1077-7476
Andrea Preissová Krejčí https://orcid.org/0000-0002-5196-7014

Notes

1. The Ukrainian children we describe as refugees are, in fact, holders of temporary protection under the Temporary Protection Directive (Council Directive 2001/55/EC) and the Czech Act No 221/2003 on the temporary protection of foreign nationals, as amended – see EUR-Lex (2001, 2003).
2. Mirela Štrumlová, 6th grade, primary school, Hrubečné Pole. *Náš koutek*, June 1992, 58(10): 17.
3. Marie Burdová, 6th grade, primary school, Hrubečné Pole. *Náš koutek*, June 1992, 58(10): 16.

4. Taňa Novotná, 7th grade, primary school, Jánské Koupele. *Náš koutek*, November–December 1990/91 [1991/92], 57(3/4): 17.
5. Davor Ivanović, 6th grade, primary school, M. Lázně. *Náš koutek*, January 1992, 1991/1992, 5: 16–17.
6. Daniela Francetićová, 8th grade, primary school, Daruvar. *Náš koutek*, October 1991/92, 57(2): 16.
7. Marina Nestingerová, 2nd grade, Daruvar. *Náš koutek*, May 1991/92, 57(9): 16.

References

Alderson P., Morrow V. (2020). *The Ethics of Research with Children and Young People: A Practical Handbook*. London: Sage.

Bobrova A., Lazarenko V., Khassai Y., Filipchuk L., Syrbu O., Lomonosova N., Nazarenko Y. (2022). *The First Days of Full-Scale War in Ukraine: Thoughts, Feelings, Actions*. Cedos. https://cedos.org.ua/en/researches/the-first-days-of-full-scale-war-in-ukraine-thoughts-feelings-actions-analytical-note-containing-initial-research-results (accessed 7 December 2023).

Chen S., Schweitzer R.D. (2019). The Experience of Belonging in Youth from Refugee Backgrounds: A Narrative Perspective. *Journal of Child and Family Studies* 28(7): 1977–1990.

Danforth L.M. (2003). 'We Crossed a Lot of Borders': Refugee Children of the Greek Civil War. *Diaspora: A Journal of Transnational Studies* 12(2): 169–209.

Danforth L.M., Van Boeschoten R. (2012). *Children of the Greek Civil War Refugees and the Politics of Memory*. Chicago and London: Chicago University Press.

Dangmann C., Dybdahl R., Solberg Ø. (2022). Mental Health in Refugee Children. *Current Opinion in Psychology* 48: 101460.

Denzin N.K., Lincoln Y.S. (eds) (2011). *The Sage Handbook of Qualitative Research*. London: Sage.

Eisenbruch M. (1988). The Mental Health of Refugee Children and Their Cultural Development. *International Migration Review* 22: 282–300.

Erdal M.B., Oeppen C. (2013). Migrant Balancing Acts: Understanding the Interactions Between Integration and Transnationalism. *Journal of Ethnic and Migration Studies* 39(6): 867–884.

EUR-Lex (2001). *Council Directive 2001/55/EC of 20 July 2001 on Minimum Standards for Giving Temporary Protection in the Event of a Mass Influx of Displaced Persons and on Measures Promoting a Balance of Efforts Between Member States in Receiving Such Persons and Bearing the Consequences Thereof*. https://eur-lex.europa.eu/eli/dir/2001/55/oj (accessed 7 December 2023).

EUR-Lex (2003). *The Act No. 221/2003 Coll. (The Czech Republic) From 26 June 2003 on the Temporary Protection of Foreign Nationals*. https://www.zakonyprolidi.cz/cs/2003-221 (accessed 7 December 2023).

Fazel M., Stein A. (2002). The Mental Health of Refugee Children. *Archives of Disease in Childhood* 87(5): 366–370.

Goldin S., Levin L., Persson L.Å., Haeggloef B. (2003). Child War Trauma: A Comparison of Clinician, Parent and Child Assessments. *Nordic Journal of Psychiatry* 57(3): 173–183.

Hameed S., Sadiq A., Din A.U. (2018). The Increased Vulnerability of Refugee Population to Mental Health Disorders. *Kansas Journal of Medicine* 11(1): 20–23.

Helseth S., Slettebø Å. (2004). Research Involving Children: Some Ethical Issues. Nursing Ethics 11(3): 298–299.

Hollo M. (2020). Traces of Trauma in Estonian Women's Life Narratives of World War II. *Folklore: Electronic Journal of Folklore* 78: 119–144.

Hones D.F., Cha C.S. (1999). *Educating New Americans: Immigrant Lives and Learning*. Mahwah NJ: Erlbaum.

Isański J., Nowak M., Michalski M.A., Sereda S., Vakhitova H. (2022). *Social Reception and Inclusion of Refugees from Ukraine*. UKREF Research Report 1. https://doi.org/10.21203/rs.3.rs-1694920/v1 (accessed 7 December 2023).

Kevers R., Rober P., De Haene L. (2018). Unraveling the Mobilization of Memory in Research with Refugees. *Qualitative Health Research* 28(4): 659–672.

Khan S., Kuhn S.K., Haque S. (2021). A Systematic Review of Autobiographical Memory and Mental Health Research on Refugees and Asylum Seekers. *Frontiers in Psychiatry* 12: 658700.

Knezevic B., Olson S. (2014). Counseling People Displaced by War: Experiences of Refugees from the Former Yugoslavia. *The Professional Counselor* 4(4): 316–331.

Lustig S.L., Tennakoon L. (2008). Testimonials, Narratives, Stories, and Drawings: Child Refugees as Witnesses. *Child and Adolescent Psychiatric Clinics of North America* 17(3): 569–584.

Lustig S.L., Kia-Keating M., Knight W.G., Geltman P., Ellis H., Kinzie J.D., Keane T., Saxe G.N. (2004). Review of Child and Adolescent Refugee Mental Health. *Journal of the American Academy of Child & Adolescent Psychiatry* 43(1): 24–36.

Miller K.E., Worthington G.J., Muzurovic J., Tipping S., Goldman A. (2002). Bosnian Refugees and the Stressors of Exile: A Narrative Study. *American Journal of Orthopsychiatry* 72(3): 341–354.

MŠMT/Ministry of Education (2022). *Ongoing Numbers of Ukrainian Children in Czech Schools* (in Czech). https://www.msmt.cz/ministerstvo/novinar/prubezne-pocty-ukrajinskych-deti-v-ceskych-skolach (accessed 7 December 2023).

MŠMT/Ministry of Education (2023). *According to New Information, Schools Registered a Total of 51,281 Children and Pupils: Refugees from Ukraine as of March 31, 2023*. https://www.msmt.cz/ministerstvo/novinar/pocty-ukrajinskych-deti-ve-skolach-se-oproti-zari-temer (accessed 7 December 2023).

MVČR/Ministry of the Interior (2023). *There Are Currently 325,000 Refugees from Ukraine in the Czech Republic* (in Czech). https://www.mvcr.cz/clanek/v-ceske-republice-je-aktualne-325-tisic-uprchliku-z-ukrajiny.aspx (accessed 7 December 2023).

Nets-Zehngut R. (2011). Palestinian Autobiographical Memory Regarding the 1948 Palestinian Exodus. *Political Psychology* 32(2): 271–295.

Papageorgiou V., Frangou-Garunovic A., Iordanidou R., Yule W., Smith P., Vostanis P. (2000). War Trauma and Psychopathology in Bosnian Refugee Children. *European Child & Adolescent Psychiatry* 9(2): 84–90.

PAQ Research (2022). *Voice of Ukrainians: Experiences and Needs of Children and Parents in Czech Education* (in Czech). https://www.paqresearch.cz/post/vzdelavani-ukrajinskych-deti-v-cesku (accessed 7 December 2023).

Povrzanović M. (1997). Children, War and Nation: Croatia 1991–4. *Childhood* 4(1): 81–102.

Preissová Krejčí A., Kočí J. (2020). Příběh 1340 dětí evakuovaných do České republiky za války v Chorvatsku (1991–1995). *Slovanský přehled: historická revue pro dějiny střední, východní a jihovýchodní Evropy (Slavonic Review: Review for Central, Eastern and Southeastern European History)* 106(2): 281–307.

Schwartz L., Nakonechna M., Campbell G., Brunner D., Stadler C., Schmid M., Fegert J.M., Bürgin D. (2022). Addressing the Mental Health Needs and Burdens of Children Fleeing War: A Field Update From Ongoing Mental Health and Psychosocial Support Efforts at the Ukrainian Border. *European Journal of Psychotraumatology* 13(2): 2101759.

Triandafyllidou A. (2022). Temporary Migration: Category of Analysis or Category of Practice? *Journal of Ethnic and Migration Studies* 48(16): 3847–3859.

UNHCR (2023). *Operational Data Portal: Ukraine Refugee Situation*. https://data.unhcr.org/en/situations/ukraine (accessed 7 December 2023).

UNICEF (2021). *UNICEF Procedure on Ethical Standards in Research, Evaluation, Data Collection and Analysis*. https://www.unicef-irc.org/research/ethical-research-for-children (accessed 7 December 2023).

Vertovec S. (1999). Conceiving and Researching Transnationalism. *Ethnic and Racial Studies* 22(2): 447–462.

Vertovec S. (2004). Migrant Transnationalism and Modes of Transformation. *International Migration Review* 38(3): 970–1001.

Webster L., Mertova P. (2007). *Using Narrative Inquiry as a Research Method: An Introduction to Using Critical Event Narrative Analysis in Research on Learning and Teaching*. Abingdon: Routledge.

Wylegała A. (2015). Child Migrants and Deportees from Poland and Ukraine after the Second World War: Experience and Memory. *European Review of History (Revue européenne d'histoire)* 22(2): 292–309.

How to cite this article: Macková L., Preissová Krejčí A. (2024). Lessons Learnt? War, Exile and Hope among Child Refugees in the Czech Republic. *Central and Eastern European Migration Review* 13(1): 11–24.

Central and Eastern European Migration Review
Received: 18 October 2022, Accepted: 30 October 2023
Published online: 14 November 2023
Vol. 13, No. 1, 2024, pp. 25–45
doi: 10.54667/ceemr.2023.19

Multifaceted Hospitality. The Micro-Dynamics of Host–Guest Relations in Polish Homes after 24 February 2022

Kamil Luczaj*

Hosting large numbers of refugees in private homes rather than in refugee camps is a fairly unusual phenomenon in the broadly understood Western context, including the post-socialist countries of Central and Eastern Europe. Thus, explorative research is much needed to determine the fundamental problems triggered by this novel situation. Based on a series of individual in-depth interviews with Polish hosts who invited Ukrainian refugees to live in their homes, this paper puts under scrutiny the micro-relations between the hosts and the guests. The study identified 6 kinds of 'difficulty', including (1) negotiating everyday routines, (2) dealing with difficult life situations and stress, (3) quarrels and divisions among migrants, (4) neglecting one's own family, (5) a too strong emotional attachment to the guests and (6) irreconcilable sets of expectations.

Keywords: hospitality, 2022 Russian invasion of Ukraine, Poland, refugees, hosting

* University of Lodz, Poland. Address for correspondence: kamil.luczaj@uni.lodz.pl.

Introduction: Ukrainian refugees in Poland and the problem of hospitality

The Russian aggression against Ukraine in 2022 resulted in an unprecedented influx of Ukrainian migrants (predominantly women and children) to Poland. Some Ukrainians found shelter in free-of-charge hotels and reception centres or decided to rent their own place for a fee. This paper, however, focuses on those who stayed in private homes free of charge. The idea of accommodating large numbers of refugees in private homes rather than in refugee camps, detention centres, hotels or hostels (Gibson 2003) is a fairly unusual phenomenon in the broadly understood Western context, including the post-socialist countries of Central and Eastern Europe and, for this reason, dubbed by the British press a 'refugee miracle' (Rice-Oxley 2022). This 'romanticised discourse', stressing the uniqueness of the situation as well as the hospitality and generosity of Poles, was also visible in the Polish media and in the first academic publications which analysed Polish society in the context of war (e.g. Boroń and Gromkowska-Melosik 2022; Golczyńska-Grondas 2022; Kalinowska, Kuczyński, Bukraba-Rylska, Krakowska and Sałkowska 2023). According to one of the estimates, approximately 12 per cent of the refugees who applied for a PESEL[1] number in Warsaw in the first week of registration were living with strangers who decided to host them for free (Bukowski and Duszczyk 2022). This phenomenon is therefore neither mainstream nor marginal but, as an under-researched topic, it certainly calls for the attention of migration analysts. Explorative research is much needed to determine the basic problems triggered by these 'strange encounters' (Ahmed 2000) and to identify policies that may support the hosts in the future (Yıldız and Uzgören 2016). Early surveys in Poland captured widespread pro-Ukrainian and anti-Russian sentiments – for example, in March 2022, 94 per cent of the respondents declared that Poland should receive refugees from the war zone and this number did not fall much in the following months, with 84 per cent of the population still declaring the need to give Polish support to the Ukrainian refugees in July 2022 (CBOS 2022). Yet media reports from Poland suggested that hospitality, especially hosting refugees in one's own home or spare room, can create unexpected problems (see, e.g., Sowa 2022). The reports also suggest that Polish schools are not prepared for Ukrainian children (Cieśla 2022), not to mention the unfavourable comments in social media, including the accusations of parasitising the welfare system (Obara 2022; Urazińska 2022). Thus, this paper contributes to the theoretical understanding of hospitality in migration studies by providing insights from Polish hosts – members of a relatively conservative and homogenous society – who invited refugees into their homes.

In the paper, I focus on how the war has impacted on the border region of Poland, namely the *Podkarpackie voivodeship*, where the major border crossings with Ukraine are located. As one of the reports stated (Unia Metropolii Polskich 2022), in April 2022 the population of Rzeszow, the capital of the region, increased by 53 per cent. It is estimated that, at that point, 104,784 Ukrainian refugees – including 30,802 children – arrived in the city. Based on a series of individual in-depth interviews with Polish hosts who invited Ukrainian refugees to live in their private properties, this paper studies the micro-relations between the hosts and the guests in a bid to answer research questions concerning the difficulties resulting from the arrival of strangers under one's own roof. The perspective of the host is the first step towards drawing a complete picture of the complicated phenomenon of in-house refugee[2] hosting. By focusing solely on difficulties, I sought to question what I refer to as a 'romanticised discourse' on hospitality, widespread both in Polish and Western media. The main contribution of this paper is to suggest that, although large-scale hospitality (in the form of home accommodation) occurred in Poland, it required emotional labour and other uneasy decisions described in the course of the analysis. Whilst this rather unusual form of emergency assistance proved to be very effective in solving the housing problem, it entailed serious non-material costs. Although the term 'difficulties', applied to refer to these costs, is borrowed from colloquial language, it occurs in the academic literature, for example in

the context of the difficulties of the migratory career (Martiniello and Rea 2014) or management studies (Szulanski 1996).

Literature review: the concept of hospitality/hostipitality

The most important theoretical concept on which I build my argument is Jacques Derrida's notion of 'hostipitality' (Derrida 2000), which 'combines hostility with hospitality in order to draw attention to the significance of the former within the discourse and experience of the latter' (Bida 2018: 120). Derrida (2000: 5) points out that 'hospitality is a self-contradictory concept' because it simultaneously assumes the best intentions of a host (towards a guest) and the subjection of a guest to a host. As Derrida (2000: 14) vividly describes it, 'as soon as there are a door and windows, it means that someone has the key to them and consequently controls the conditions of hospitality'. Thus, 'the expression *make yourself at home* suggests a welcome as a feeling of comfort, while veiling for Derrida what is implicit: "make yourself at home" in my home with the secondary condition that "you" will not make this your home' (Bida 2018: 122). In other words, the notion of 'hostipitality' suggests that unequal power relations between guests and hosts can have an impact on the homemaking process (Bida 2018; Laachir 2007).

The Derridean critique inspired the theoreticians of migration to recognise that true hospitality 'is a refusal to conceive the host and the guest as pre-constituted identities. It is about the recognition that they are mutually constitutive of each other, and thus, relational and shifting as all identities are' (Dikeç 2002: 239). Thus, the critical understanding of hospitality should challenge 'the kind of categorical thinking that delineates hosts and guests' (Bida 2018: 120) because a host and a guest always co-construct themselves and act anticipating the presence of the other. On the one hand, in order to be able to offer hospitality, the host must be the mistress or master in the house and must be assured of his or her 'sovereignty over the space and goods he [*sic*] offers or opens to the other as a stranger' (Derrida 2000: 14). Otherwise, the host may lose the sense of being at home. On the other hand, 'recognizing the host as a host does not, and should not, necessarily mean subjection on the guest's side, but should rather invoke an appreciation of the limits of the guest's actions towards the host, which is more of a sensibility than a subjection' (Dikeç 2002: 239). This leads to the theoretical model predicting that the host 'is not necessarily immobile or in full control of the physical and social space, while the guest is not without agency even while at the mercy of the host' (Bida 2018: 124). 'Hostipitality' is, thus, 'not necessarily hostile but always potentially so through the power relations that are involved in "giving" place and being welcomed' (Bida 2018: 125–6). As Bida further suggests, 'Derrida's understanding of hospitality is vital to a new conception of home as a labyrinthine, multi-scalar map that is based on personal, interpersonal, and social relations' (Bida 2018: 121). This leads us to the literature on critical geographies of home (Roberts 2019: 88–89), which has also impacted on the conceptualisation of this paper by highlighting that home (a) 'is simultaneously material and imaginative', (b) a 'space in which people are positioned differently with respect to their different social locations (e.g. gender, age, ethnicity and class)' and (c) should be viewed as being 'crosscut by multiple relations to personal, private, public and political worlds'.

Hosting practices

The literature on hosting large numbers of refugees in private homes is often focused on countries adjacent to conflict zones outside Europe and North America (e.g. Jordan, Lebanon, Turkey; see Dinçer, Federici, Ferris, Karaca, Kirişci and Çarmıklı 2013). There is also a vast literature on hospitality in the Mediterranean (Kyriakidou 2021; Rozakou 2012) but home accommodation is usually not its prime focus. Even in these cases, the non-camp refugees are discussed as an exception to the rule that war fugitives find shelter in large centres.

In the Western European context, the literature embraces small-scale social initiatives inspired by local government or non-governmental agencies (see, e.g., Bassoli and Campomori 2022), eager to accommodate migrants in private houses or apartments. Very recently, Bassoli and Luccioni (2023) systematically reviewed the literature on homestay accommodation for refugees in Europe. All in all, the authors identified just 75 papers offering micro-, meso- and macro-level analysis of this phenomenon. Their findings suggest that, although the literature – available in English but often only in French, German or Italian, including Master's and Bachelor's dissertations – provided some knowledge about the host and guest profiles, their motivations and characteristics of the hospitality relationship, 'the literature also largely overlooked the reasons for power relations between hosts and guests' (Bassoli and Luccioni 2023: 16). Rare studies – such as Merikoski's case study of Finland (2021, 2022), focused precisely on the micro-level home accommodation – often point to the ambivalent attitude of governments towards such grassroots initiatives. Despite the significance of the analysed papers, Bassoli and Luccioni (2023: 18) argue for 'a more critical approach of hospitality, fueled by considerations for refugees' experiences and trajectories, and for power relations between hosts and guests'.

Although receiving societies often imagine themselves narcissistically as being hospitable, various problems complicating the reception of refugees were identified (Gibson 2003: 367–368) by the studies focused on broadly understood hospitality. These often include visa restrictions favouring only selected categories of individuals (e.g. business people, government officials, students), tighter border procedures or limited access to healthcare and education (Mason 2011: 362–363). In the light of a lack of research on hospitality in post-communist countries, I build on the studies on hospitality in other cultural contexts (Beyer 1981; Mason 2011; Santos-Silva and Guerreiro 2020; Valenta, Jakobsen, Župarić-Iljić and Halilovich 2020) and forced migrations (Lampe 2014; Morawska 2000; Stola 1992). These sources document the limits of hospitality – various kinds of human costs of post-war migrations, including travel difficulties when, for example, as a consequence of the Syrian war, many 'humanitarian ships found it hard to dock at European ports' (Santos-Silva and Guerreiro 2020: 123). Furthermore, Valenta *et al*. (2020: 162) also point out that Syrian refugees in the neighbouring countries and also in Southern Europe, including Greece and Italy, have experienced 'less-than-sufficient reception and integration conditions'. Not only do these people live in overcrowded refugee camps but they also risk losing their refugee status if they decide to move further West from countries like Turkey. There are also reports pointing out the harassment and exploitation of Syrian women and girls in return for accommodation (Rohwerder 2018; Yıldız and Uzgören 2016). The third common problem was associated with media images, which contributed to the social representation of refugees (Blumell, Bunce, Cooper and McDowell 2020). In most contexts, refugees were usually depersonalised, pathologised, criminalised or demonised as a group and depicted as a threat (Mason 2011). Based on the comparative analysis of the Portuguese press (2015–2019), Santos-Silva and Guerreiro (2020: 134), argued, for instance, that 'the refugee is portrayed as an entity with no voice and no identity' and is 'normally described without any individualizing features, a standard image', 'like a human mass'.

After a brief reflection, it becomes clear that none of these circumstances resemble what happened in Poland after 24 February 2022. For instance, the journeys of many Ukrainian refugees were largely facilitated by their family members – who had already been living in Poland prior to the war – and, later, by numerous Polish residents who would use their private cars to pick up refugees from the border. Furthermore, refugee camps were not necessary, as many refugees found accommodation in private homes. Last, the media images were very favourable, as contrasted with the images of migrants on the Polish-Belarusian border (Golczyńska-Grondas 2022; Jasiewicz and Jasiewicz-Betkiewicz 2022). More analogies, despite all the differences, can be drawn between the phenomenon of Polish hospitality and Mason's (2011) analysis of the Iraqi refugees in Jordan, centred on the pan-Arab ideologies concerning the Middle Eastern kind of hospitality – *dhaifa*. It requires states to receive 'fellow Arabs as "visitors" and "guests", regardless of their reason for, or mode of mobility'

(Mason 2011: 354, see also Still 2007). First, the pan-Arab ideologies (Mason 2011: 356) resemble, at least to some extent, the sense of Slavic solidarity between Poland and Ukraine. This solidarity stems from cultural and linguistic similarities, despite the complicated history between the two states. In other words, although white and Christian Ukrainians were perceived as the 'others', they were the 'familiar strangers' (Golczyńska-Grondas 2022; Kyriakidou 2021; Said 1978). Not the completely unknown 'Others', who seem menacing to many Poles pointing (usually wrongly) to the impassable 'cultural differences' between Middle Eastern refugees and themselves. Nevertheless, there is also another rationale for this kind of solidarity – a strong anti-Russian sentiment resulting in the willingness to fight against the common enemy. This is closely related to another analogy between Polish and Arabic solidarity – the reluctance to use the word 'refugee' in the discourses concerning forced migration. In the Arab world, the term 'refugee' has largely been rejected in the context of Iraqi refugees, as the figure of the refugee is regarded as synonymous with the Palestinian situation. Instead, the Iraqis were perceived as 'temporary guests' in Jordan, a terminological solution that appeared again in 2022 in Poland, responding to the anti-migrant sentiment, especially in relation to the crisis at the Belarusian border (Jasiewicz and Jasiewicz-Betkiewicz 2022).

Methodology

The overall objective of the project (though not of this paper) focused on the home accommodation (or homestay accommodation) of Ukrainian refugees in Poland, which also involved interviews with Ukrainian refugees and aimed to determine why the Polish 'refugee miracle' could happen and by what it was characterised. This analysis, which is part of a larger whole – a series of interrelated papers on this topic – answers the following research question: What kinds of problems occurred and how were they sorted out from the point of view of the host?

The research method was a semi-structured individual in-depth interview which, as opposed to quantitative surveys of opinions, allows the researcher to investigate in detail the phenomenon under study (Kvale 1996). Based on the interview protocol, the interviewer could add more questions to better understand the point of view of the interviewee or could ask the interlocutor to provide some examples and detailed descriptions of crucial phenomena. This technique is believed to be the best match for explorative studies of new phenomena, especially if the study is focused not on simple declarations but on complex and often traumatic experiences.

The interviews were completed between May and July 2022, after obtaining approval from the ethics committee at the University of Information Technology and Management in Rzeszow.[3] It allowed us to capture the fresh lived experiences of the Polish hosts. Five trained interviewers participated in the project.[4] In order not to interview our friends or acquaintances, we recruited the study participants through posts on the local Facebook groups intended for people helping refugees – '*Solidarni z Ukrainą Rzeszów*' and '*Pomoc Ukraińcom w Rzeszowie/допомога українцям у Жешові*'. Although this methodological choice does not seem controversial (as the technology enabled or streamlined most of the assistance), it should be acknowledged that people not using the internet were excluded from the study. Internet-based sampling was the fastest possible way to get in touch with hosts and interview them as soon as possible, as we expected that the memory of lived experiences could fade away very quickly. The geographical focus was, thus, selected based on the convenience criteria: all the team members were (at that time) based in Rzeszow and were able to start interviewing hosts without unnecessary delay. For practical reasons but also in order to minimise the variation within the sample, we decided to focus on this city, which served as a communication node for many Ukrainian refugees.

All in all, the team interviewed a total of 15 hosts who lived in Rzeszow, the capital of the Podkarpackie voivodeship (6 cases), and nearby towns and villages (9 cases). The main implication of a small number of

interviews is that the study – unable to provide an intersectional analysis – focused, instead, on mapping various problems associated with home accommodation. All the names were anonymised.

Due to the explorative nature of this study, the sampling strategy was inclusive: everyone who had been hosting a Ukrainian refugee in their home after 24 February 2022 was invited to take part in the study. The basic criterion was the fact of living together with a refugee in one household for at least a few days. In the final sample, however, there were mainly people who decided to host refugees for an extended period of time (more than 3 months). Only 1 person provided shelter for less than a week. The basic demographic details can be found in Table 1 in Appendix 1. The hosts, who took in people of Ukrainian descent, were of different ages. The youngest participants were in their 20s and the oldest in their 70s. With one exception, the participants were female, as Facebook groups were used more often by women than by men. The hosts represented different professions: from highly skilled programmers, lawyers or business-owners, to HR officers, office clerks and railwaymen and to unemployed people. Usually, they were quite affluent, with some in an average material situation. In the study, we did not limit ourselves to ethnic Poles. We also interviewed two permanent residents of Poland of Ukrainian descent who were willing to help their compatriots.

In terms of housing, most of the refugees were hosted in houses (12 cases) or apartments (3 cases). Usually, the hosts lived all the time with their guests but, in 3 cases, the hosting families offered the refugees a separate apartment or a part of the house with a separate entrance and visited them regularly. The number of people in single accommodation varied greatly from case to case. Sometimes, 1 person had 1 room at their disposal but, in extreme cases, 4 families totaling 15 people had been living in the same house at the same time. Typically, however, 1 host supported 1 Ukrainian family of 2 to 4 people. The age of the Ukrainian guests also varied greatly, from children to middle-aged people to seniors. The communication strategies varied greatly: from using English (the younger interviewees) or Russian (the older interviewees) as a *lingua franca* to utilising a mix of Polish and Ukrainian or Russian.

As this overview shows, I aimed to investigate very different cases in order to discuss situations as diverse as possible. Based on the transcripts, we analysed the problems that occurred during these somewhat lengthy stays. I analysed the entire collection of interviews in a 'bottom-up' manner: I decided not to formulate any prior hypotheses but, instead, to look for the emerging themes (Braun and Clarke 2022). For this reason, I analysed excerpts discussing any kind of difficulty or problematic situation which occurred as a result of hosting a Ukrainian refugee. Although the rationale behind this paper is Derrida's analysis of hos(ti)pitality, interview data were not used to confirm or refute the claims discussed above. Rather, the interviews were open-coded: the main theme of 'difficulties' as well as 6 major sub-themes emerged from the material. This study is, thus, based on abductive reasoning because, following Kathy Charmaz (2006: 48), I simultaneously kept initial coding open-ended (as the proponents of grounded theory would do) while still acknowledging the prior ideas. The data analysis made it possible to check the researcher's hunches and grounding ideas in empirical material (Charmaz 2006: 149). In other words, as Ian Dey (1999) provocatively put it years ago, I was trying to keep an 'open mind' but not pretend to have an 'empty head'.

For the purpose of this paper, 'difficulties' are defined as disruptions of daily life as a result of the presence of strangers. The theory of action behind this research stems from the perspective of life-course research, according to which the difficulties are the considerable losses that actors avoid while trying to 'improve, or at least maintain, aspects of their physical and mental well-being over time' (Bernardi, Huinink and Settersten 2019: 2). Simply put, difficulties disturb the equilibrium achieved in a life course. The adopted understanding of difficulties is narrower than the sum of 'hardships and costs' often discussed in migration studies (see, e.g., Fullin and Reyneri 2011), which often involves financial burden and legal problems. On the other hand, it is broader than Margaret Archer's (2007) concept of 'personal concerns' because the discussed difficulties, as we shall see, are not always subject to reflection.

Results

'It's not that much fun when someone is wandering around the house': problematic situations

In the interviews, one can find various situations that not only disrupt the everyday routine of family life but can also be classified as a difficulty, in the sense introduced at the beginning of this paper. I analyse them below and discuss the context in which they occurred. Some of these situations were classified as problematic by the interviewees (e.g. the misbehaviour of the tenants) and some were indicated in response to other, seemingly unrelated, interview questions (e.g. the animosity towards compatriots from another region of Ukraine). It is worth emphasising that, in 6 interviews, no serious problems could be identified (see Table 1 in Appendix 1). Three interviewees (Jadwiga, Magdalena and Aniela), in turn, recalled serious difficulties and 6, moderate difficulties. The narratives of the majority of hosts suggest that hospitality is a difficult process which impacts on the micro-dynamics of the home, in addition to minor issues reported or implied here and there in other interviews.

Everyday routines and negotiations

First of all, the sudden appearance of guests in the household resulted in some relatively easy-to-predict disruptions. Often, the hosting process started with re-making an entire home and re-thinking daily routines. The interviewees were generally happy to rearrange their places. For instance, Karolina adapted an attic for the needs of her guests. Alicja, in turn, explained that, at the beginning, she gave her own bed to the guests and slept on the couch in the living room before moving to the children's former playroom.

Some interviewees, however, narrated tensions which can often be attributed to intercultural differences. Guests' lack of familiarity with the realities of life in Poland and, more generally, Western lifestyles, disrupted the everyday routines of Polish hosts. This happened when the guests were reluctant to change their habits. For instance, Jadwiga explains that her guests were reluctant to use the dishwasher and washed plates by hand, which disrupted the usual order of doing things at her house. Dealing with street-level bureaucracy, which I consider to be a part of everyday life, was another kind of difficulty. On another occasion, with reference to this interview, Jadwiga's guests had forgotten to take all the necessary documents with them (because the host's instruction was not detailed enough) and, as a result, they could not open a bank account as she had planned.

> *We went to set up a bank account and do some shopping. (...). I said: 'Just remember, take your passport' and she took the passport but she didn't take her PESEL. That's why I just started laughing then* (Jadwiga, G1).

> *These were minor difficulties and the hosts had neither power nor will to oppose them. Moreover, the hosts were usually far from blaming their guests, even if they judged their behaviour to be irresponsible. Instead, they tried to understand the small differences and miscommunication by emphasising that their guests rarely travelled abroad or even within Ukraine: 'Most of these people have never travelled abroad' (Damian, G4);*

> *'They did not even go to Western Ukraine to their husbands' families but they lived there and the war forced them to come here'* (Yulia, G10).

In other words, many refugees, especially those who had to rely on free accommodation, did not possess what, in migration studies, is referred to as 'transnational capital' (Gu and Lee 2019). Although not necessarily on a conscious level, these differences resulted in a sense of strangeness between the host and their culturally similar guests.

Some difficulties, however, were not related to intercultural contact and its implications. The interview with Jadwiga, an office clerk and a mother of 2, who was decidedly the most critical interviewee, contains many clear examples of rearrangements which turned out to be far more problematic. First, the daily routine of her family was disrupted because her guest had a very different rhythm of the day.

> *I must admit that she had a lifestyle that turned our life upside down, so to speak. Well, maybe it's a bit funny but this way of life was completely different from ours because* [before that] *we got up in the morning, the children went to school, so when we went to bed in the evening, there were no children (...). This girl, on the other hand, worked at night. So for them, the day started after noon, when she got up, when she could eat breakfast. In the evening, she could go out for a walk somewhere and talk to someone. Do something in the afternoon, possibly. So our son adopted a similar life rhythm* (Jadwiga, G1).

This disruption was severe because it impacted on Jadwiga's child (see the next section for more details). The situation was all the more tense as the host disagreed with her guest on the parenting style. Jadwiga was very reluctant to give a smartphone to her son, unlike the Ukrainian mother. For this reason, at the moment of the interview, she declared that she was unsure if she could host another family. Another reason for the dispute were eating habits. During the interview, Jadwiga was very critical of her guests' choices.

> *Usually, we buy, I don't know: bread, milk, some vegetables, fruits. Candy, too, but not much – and everyone there just spent most of their money on candy. You can believe me. It was candy and, in the case of Natalia and Olena, also cigarettes because they smoked. Or beer* (Jadwiga, G1).

Older interviewees, like Aniela (a currently unemployed woman in her 50s who takes care of her grandchildren) or Magdalena (a pensioner in her 60s), also believed that their guests should have been more engaged in the everyday chores and start acting as family members who regularly help others in the simplest situations.

> *For example, in my garden, I had such an impression that they, the princesses, were sitting and sunbathing in the sun and I was raking and raking the garden. I organised everything for them. And it did not occur to them that maybe they should help in exchange for my help* (Magdalena, G3).

> *I was cleaning here,* [because] *they wanted to get used to the new environment. I wanted to make it possible for them somehow, right? I helped with cleaning and so on. And then they didn't start to clean. They didn't want to do anything, at all. Well, and I started to ask them to, right? I asked once, the second, the third time to clean up on the balcony because the cans were everywhere there* (Aniela, G11).

This last excerpt makes it clear that the hosts had their expectations of the guests. Thus, they did not follow the ideal of unconditional hospitality, which 'implies that you don't ask the other, the newcomer, the guest, to give anything back, or even to identify himself or herself' (Derrida 1999: 70). In this sense, Polish hospitality, even if sincere and requiring sacrifices, was not unconditional.

Negotiating everyday routines and planning the day, including running errands and dealing with administrative matters, prompts the question of how boundaries are being built. In the majority of cases, these negotiations were not overt and many of the rules remained implicit. It was rare that a host decided to introduce their own clear-cut rules and stick to them, which was articulated clearly by Damian (G4): 'They were aware that they were our guests and that they must respect our rules, otherwise, we would have to part with such people'. His attitude, even if not intentionally hostile, is an exemplification of the model of limited hospitality. Furthermore, the relationship between Damian and his guests resembled 'Gesellschaft' in Tönnies's (1887/2021) understanding of this term – a collaboration based on rules (written or unwritten) and prior arrangements. On the other hand, it had very little to do with the close-knit type of community based on emotion – the 'Gemeinschaft' – or the 'like-a-family' situation, which was ideal for the majority of our interviewees.

This, less formalised, family-like kind of relationship was, however, a double-edged sword because it could also trigger some serious problems. For instance, Magdalena admitted, after the formal recording had ended, that she felt used by her guests. In the main interview, she narrated many situations where the lack of clear-cut boundaries and rules caused frustration on her side. Several times her guests undermined her authority by questioning the rules she suggested. A simple but meaningful problem was related to garbage recycling. Although it was mandatory in Poland, her guests ignored her requests in this matter.

> *I said that we recycle it all, plastic, etc. And suddenly it's such a mess: zero order and a lot of shit, because when I found papers in a composter, etc. I was getting crazy. I think it was the thing that annoyed me the most* (Magdalena, G3).

Moreover, one day she found out that there was one more person living in her household. This is precisely what Derrida would refer to as an abuse of 'hospitality rules'. This discovery resulted in an open conflict, this time not about practicalities but about fundamental rules of the house and regulations.

> *And when I went in there and saw that she was there behind my back, I went nuts. I lost my nerve because suddenly…* [Before that] *they didn't know where the* [bus] *stop was and stuff. And all of a sudden, they brought a woman here behind my back and I didn't know about it at all. It's a bit not okay, a bit unfair* (Magdalena, G3).

Although narrated euphemistically, Magdalena is clear that this was a serious transgression. The situation got even worse when she decided to help another family and could feel that this resulted in her losing sovereignty over the space and goods (Derrida 2000: 14).

> *I say to them* [the first family] *like this: 'Listen, I am driving home a 17-day-old child and a lady. You have to make space in the bedroom'. And she says that she does not really want to move because she has comfortably gotten used to the king-size bed. Jesus, I was really annoyed* (Magdalena, G3).

Summing up this part, it is worth emphasising that, even when it comes to standard routines or dealing with street-level bureaucracy, some adjustments need to be made. Moreover, hosting turns out to be a difficult exercise in setting boundaries and respecting the co-constituting others in the host–guest pairing. In most cases, the unwritten rules made the hospitable hosts able to behave like hosts and guests like grateful guests. Only in a few cases were some blameworthy transgressions noted because, in general, the hosts and guests shared the same general idea of power relations with the privileged position of the host. The implication of this analysis

is, thus, not that the difficulties are ubiquitous but that they do occur and sometimes make host–guest relations quite tense.

Difficult life situations and stress

Bringing a refugee home often means bringing the war home. Highly stressful situations involving death, forced separation and human diseases appeared in the recollections of the difficulties experienced by the Ukrainians and by their hosts – who also had to face death and illness, sometimes for the first time in their lives.

> *And it turned out that Andrii* [Oksana's husband] *was dead. He died of a heart condition at home that day and it was a terrible day for me. I felt that I had taken too much on myself. I was not able to cope with it. I had to de-stress and rest for a while because I knew that I had to tell Oksana that her husband was dead* (Magdalena, G3).

> *Nadia was emotionally broken. She was crying all the time. She was worried about her husband... She was very worried about her family... She was in a very bad mental state* (Emilia, G6).

> *On the bus, she didn't drink. Just in case, so as not to go to the restroom. She had mobility problems. She is very obese and generally… It's a problem if she doesn't drink. When she didn't drink, she didn't take any medications. If she wasn't taking any medications, her sugar level dropped. So in Poland, she ended up in the hospital but they pumped her up there. And then, when they got to us, she basically laid down and looked at the wall for two days* (Aleksandra, G7).

In the entire pool of interviews, the most striking case was narrated by Aniela. One of her guests turned out to be suffering from alcoholism and had a bad influence on another Ukrainian refugee. The inability to control her behaviour and take care of the children posed a difficult dilemma for Aniela.

> *She was sleeping practically all the time. And she started to abuse the child, right? She took her off the bed once. She grabbed her hair and pulled her across the floor. She pulled her, right? The second time she threw her against the wall and I went to Social Security* (Aniela, G11).

Eventually, Aniela decided to report this case to a Family Support Centre, after a series of unsuccessful interventions, including many talks with the guests and their relatives residing in Poland. The reactions of the hosts to the difficulties obviously varied from legal interventions to the feeling of burnout (Małgorzata: 'These things wear me out') to everyday distress (Matylda: 'We all need to recover a bit, kind of get back on our feet, kind of re-think our family'). Aniela's radical measures were needed because the addicted person had a minor in her custody and, at some point, just decided to leave to stay with a male whom she had just met (and who came drunk to pick her up). The psychological burden was, however, noted also by the interviewees who co-experienced their guests' life traumas and (relatively minor) problems – e.g. with finding a suitable job or a doctor who would give the refugees the treatment they were used to (e.g. tooth extraction in full narcosis). They did not usually seek professional advice but worked it out within their family. This is an example of how the presence of guests transcends what is commonsensically understood as hospitality. When guests' problems become central household problems, the mistress or master can feel like they lose the sovereignty over their space.

Quarrels among migrants

Another type of problem was associated with arguments between the guests, which happened for 2 major reasons: as a result of the internal divides within Ukraine or stemming from everyday life situations, as analysed above. On several occasions, the hosts quoted animosities resulting from ethnic, linguistic, regional, civilisational or geopolitical divides between the West and the East. This is due to the stereotypes associated with the theory of 'Two Ukraines' – 'the heavily demonised Galicia (inhabited by crazy nationalists and led by American pawns)' as opposed to the 'caricatured Donbas (inhabited by homo Sovieticus and controlled by the local mafia and the Russian fifth column)' (Riabchuk 2015: 146).

> *At first, I saw that there were such animosities, maybe not exactly animosities, but such... between families from Eastern and Western Ukraine. Some say that those from Eastern Ukraine are Muscovites (...) On the other hand, those in Western Ukraine are called Banderovtsy* (Damian, G4).

> *I had people from the East. On the other hand, at my mother's house, there were people from Lviv. That is East with West. And in fact, there were Russian-speaking and Ukrainian-speaking people. In the beginning, there were also disagreements and I'll say right away that these disagreements were very unpleasant. (...) At one point, there were comments, for example, when someone from the East wanted to help,* [the guests from Lviv commented] *'those servants from the East'* (Jadwiga, G1).

These interviewees who decided to take in more than one family were, thus, exposed to additional stress caused by the disputes between the guests. In this sense, the hosts once again felt as if they were losing control of their own house.

Secondly, the guests often had their own personal issues (i.e. unrelated to war), which they brought to the house with them. Motivated by personal factors, the quarrels between migrants could make the atmosphere at home unbearable. Vivid examples appeared in Magdalena's interview, where family problems intersected with class problems. One of the children she hosted was chaperoned by his nanny (who herself left a child in Ukraine). After some time, the mother, who had abandoned her child before the war, decided to come to Poland. This was when the temperature of conflict grew in a flash.

> *Well, there were terrible disputes, which I didn't want to allow and I said 'I don't have even a square foot more' and that 'I don't care who the mother or the caregiver was', that 'there was no room for so many people here' and 'your family matters don't interest me'. 'It's not my cup of tea'* (Magdalena, G3).

The situations analysed in this section and the two initial sections were typically not caused by intentional actions of the guests but oftentimes stemmed from cultural differences, life traumas, poor health and other independent factors – which were, nevertheless, associated with the guest or, to put it differently, were largely independent of the host. In the next three sections, I analyse the problems which resulted from the social constructions and behaviours of the hosts who, in their willingness to help, could also harm themselves or their family members.

Neglecting one's own family

Hosting strangers in one's own home required significant sacrifices by the hosts. We have already analysed the negotiation of everyday routines and dealing with stress and tension at home. 'I am a doer', says Yulia

(G10) who explains that, for her, it is easier to do something than to just sit and watch passively, which makes her anxious. Although this project does not allow us to determine the psychological profile of the hosts, which requires a different methodological approach, many interviewees presented a very strong 'hands-on' activist attitude in helping others – for example, the homeless. In the case of such activist-minded people, taking in refugees may trigger a problem that stems not so much from the real influence of the guest on the host but from the symbolic dependence – the host's willingness to do his or her best and stay close to the guests and their problems. Klementyna's comment explains why people like her were so deeply involved in helping and expected a lot from their guests: 'I have such a tendency, it seems to me (...) that sometimes I don't give enough space for people to organise things their way. On the contrary, I just give everything on a plate' (Klementyna, G8).

It is important to highlight that hosting a refugee requires not only emotional work in relation to trauma coming from the 'outside' (i.e. with the guests) but also emotional costs to maintain good relationships with household members, most notably life partners and children, who were not always as eager to help as our interviewees (usually the initiators of the help) but nevertheless had to change their habits.

> *Basically, I devote every bit of free time to them* [the guests]. *My children resent that a little bit. The children were used to their dad. They see that I am simply not available every day as I was before. I come home very late in the evening and, well, I have a little less time for them because of this. All free time is used for people from Ukraine* (Damian, G4).

> *Certainly, it was hard for him* [her husband] *and he took more care of our son and more household duties fell on him* (Yulia, G10).

> *Pardon the expression,* [I had to clean] *vomit in the bathrooms. Well, and that's why tensions began to arise between me and my husband, right?* (Aniela, G11).

Tension could also be felt internally by the hosts who felt that they had too little time for 'concerted cultivation' or the cultural logic of child-rearing, requiring participation in many organised activities and thus enormous non-salaried labour, particularly for mothers (Lareau 2002).The time-consuming activities varied from picking up refugees from border crossings to dealing with bureaucracy, providing them with advice or everyday commuting.

> *She went to Rzeszów and was supposed to come back but then, I remember that she missed the bus. And back then, I also had problems with my son, because he fell ill (...). I spent that day in the doctor's office. I arrived home and I was already so exhausted. I admit I drank some beer, mowed the lawn and just sat down and said that I had already had enough of everything* (Jadwiga, G1).

> *This never caused them a problem. They just went to the bus stop and went off. Much worse when they missed the bus: 'Alicja, will you drive me?' 'Yes Ania, I'm on my way'* (Alicja, G2).

This sense of neglecting a family might be especially strong due to the gender composition of the sample and the relative affluence of interviewees because the middle-class concept of family life as a project (Lareau 2002; Metzgar 2021) was hard to reconcile with the sudden disruption of rules and habits. Although time investment caused serious fatigue, as we can see in the two contrasting excerpts discussing very similar situations, some hosts dealt with it more easily than others, because of their personal situation. Alicja, whose relationship with

her guests was probably the strongest in the entire sample ('Ania is like family, just like my sister'), could devote more time to the guest because her husband was very often away from home due to nature of his work. Alicja and Jadwiga, however, agree on the more important consequences of their involvement: the way it impacted on their nearest and dearest, who might have felt neglected or even abandoned.

> *It was such a sacrifice of our life, at the expense of someone, but the awareness that they were worse off than we were helped* (Alicja, G2).

> *Okay, he* [Vova, the boy] *would come for breakfast and sometimes would say: 'Jadwiga, I'm already up'. 'Would you like breakfast now?' (…) And my husband would look at me sometimes and say: 'But you have two children'* (Jadwiga, G1).

These examples suggest that it was the mere presence of guests (and not their demanding attitude) that made the hosts do things which negatively impacted on their own families. In these cases, the hosts did not display any signs of 'hostipitality', understood as the negative influence of the host on the liberties of the guest. On the contrary, it was the hosts' internal sense of obligation that made them invest their time and disrupt family routines in order to help refugees.

Too strong an emotional involvement

The heads-on approach might result not only in a sense of neglecting one's family but a twin feeling of loss, which affected the hosts themselves and not their families. Some hosts were so involved in helping that every misunderstanding could result in distress. Other interviewees reported getting too easily attached to the newly acquainted people. Hosts like Alicja felt bad not only because they could harm or offend their nearest and dearest but also the guests. She felt stressed because she *anticipated* that her guests might not have felt at home: 'And I was a bit stressed by the fact that they thought that it was stressful for me, that they disturbed me and they apologised all the time that someone said something louder' (Alicja, G8).

In this situation, she was on the verge of losing the sense of being in her own home, a scenario predicted by the post-Derridean literature. Furthermore, such involvement may make the host feel bad when the relationship ended or developed in an unexpected way. Emilia explicitly stated that she suffered when her first guests left her house: 'I was terribly sorry to part with them because I had already gotten used to them. I got too emotionally involved' (Emilia, G6). Magdalena explains why, knowing herself, she decided to look for independent housing for some of her guests: 'And now another person occurred (…) I was terribly afraid of emotional attachment because I know I get attached, well, and I got her an apartment' (Magdalena, G3).

Jadwiga, in a very similar vein, narrated how hosting refugees negatively impacted on her mother.

> *She would get too emotional and worried by them. There was a moment when my mum didn't sleep. She was very upset about all this, this situation. 'What's next?' Because they didn't have a job, because you don't know what was going to happen next* (Jadwiga, G1).

These cases suggest that there exists a relationship between deep involvement and emotional suffering. Furthermore, it can be argued that the involved hosts may also suffer because their expectations were incompatible with the needs of some migrants.

Incompatible expectations

When hosting a stranger, we cannot really know what this person expects. Furthermore, displaced people often do not have precise short-term life plans, not to mention more far-reaching ones. Obviously, it happened that the guests could not obey some rules (as we observed in the first section) or were too demanding, as judged by the hosts.

> *Recently, she calls me and says, 'Well, because… you promised there would be schools'. So* [in] *a little bit demanding way* [she asks] *me if I could figure this out for her daughter because I mentioned something* (Magdalena, G3).

Surprisingly, however, the problem of incompatible expectations was usually caused not by the too-high expectations of the guests but by their too-low expectations (or demands). When some ideas of the hosts did not resonate with the guests because they did not want to be as active as the hosts had hoped, it made the hosts feel as if their efforts were a waste of time. Thus, intensive involvement could also lead to disproportionate expectations. This was obvious when Marcelina, a businesswoman in her 40s, recalled how she tried to encourage her guests to find a job in Poland.

> *I had to repeat five times so that they would go here, here, here and look for a job. Well, she wanted to work, but she wouldn't be a hairdresser because she had already been burned out. (…) I explained that here you couldn't work illegally anymore. You must register with the Employment Office. You have to do something with yourself. You have to get your 'ass' in gear and tell them you want this job. Even if you're* [Ukrainian], *they will understand you* [at the office]. *I wanted to force them, to mobilise them* (Marcelina, G16).

The interview with Jadwiga provides several instances of incompatible expectations associated with 'too much' effort – e.g. when she suggested some cultural events or books to the guests but they seemed to be uninterested. Or when she felt upset when her guests closed their bedroom door and did not want to talk – for example, about their plans to leave. Eliza, an office worker in her 30s, in turn, on many occasions, emphasised that her guest was self-sufficient, which made her feel upset. The host would reach out, which she stated directly ('I mean I was happy in general, how she asked me anything, that she wanted some help'; 'After all, I'm not going to go to her every day and knock since she does not invite me there'). Eliza's guest could enjoy her privacy because, unlike the majority of people hosted by our interviewees, she was given a separate apartment and could get in touch with the host only when she chose to.

> *I offered her* [my help], *but she didn't take it.* [She was doing] *everything by herself. When I asked about her, she did not give any information whatsoever about herself. She always replied that everything was fine. When I asked once if her partner was okay then, she avoided the answer. I don't know much about her (...) I didn't want to impose myself; sometimes we exchanged a few words in the office, but the relationships were not close. Sometimes I lent her a vacuum cleaner or a clothes dryer but it was also like… I didn't want to go in, of course, she let me into the apartment, but I didn't feel that she insisted that I stay for a cup of coffee or something, so I just didn't impose myself* (Eliza, G9).

Eliza, thus, suffered because her guest was uninterested in any kind of friendship with her and used her apartment as a hotel. However, she directly pointed out a class difference between herself and her guest, who

happened to be employed in a clearly higher position within the same international corporation. The additional but related factor here was English-language proficiency, which was another cause for shame because the guest clearly had more linguistic capital than the host.

These examples suggest that the non-reciprocated need for close-knit bonds may cause emotional stress and disappointment. The theoretical implication is that these difficulties were caused by the mere situation of hosting refugees at home, not by the guests or hosts themselves. It is equally unreasonable to blame the hosts for wanting very much to offer their help and the guests for being unaware of local customs. The Derridean concept of 'hostipitality' helps us to understand that, even with good intentions, long-term home accommodation poses difficulties for both sides.

Discussion

From the analysis of the problems discussed in this paper, it does not follow that hosting is always an unpleasant situation and that the numerous benefits of hospitality should be discussed separately. Although this paper focused on the difficulties, its main finding is that the host–guest relations were not always tense but were clearly very complicated. The nature of Polish hospitality was affected by many factors, of which gender, social class and language should be highlighted. First, the fact that Poland became a refuge predominantly for women (Kohlenberger, Pędziwiatr, Rengs, Riederer, Setz, Buber-Ennser, Brzozowski and Nahorniuk 2022) positively affected the attitudes of Poles towards Ukrainians. In the popular anti-immigrant discourse, the first and foremost argument is that it is young males who 'invade' Europe. In the situation I have analysed, the only males who could legally cross the border were children and seniors, both considered nearly as vulnerable as women. Second, as some of the analysed cases suggest, social class impacted on the situation of forced migrants (see Mason 2011). Eliza's situation epitomises, on a micro scale, the perception of many Poles who, for the first time in their lives, had the opportunity to discover that a refugee does not have to be in an economically disadvantaged position. The first wave of Ukrainian migration proved this assumption to be wrong because the refugees who came to Poland just after the full-scale invasion began were often relatively affluent and because the instant decision to relocate required owning a car (Maja 2023); conversely the decision to stay was associated with poor health or limited resources (KAI 2022). Thirdly, it is important to discuss how language shapes the relationships between the hosts and guests. On the one hand, it can be argued that the language barrier may not exist, at least on a basic level, due to the relative similarity of the Polish and Ukrainian languages, which enabled Slavic intercomprehension (Luczaj, Leonowicz-Bukala, Kurek-Ochmanska 2022) and the wide availability of technological tools (such as Google Translate), not to mention the knowledge of Polish language by many Ukrainians, especially from the Western parts of the country. On the other hand, however, language might have been a barrier that prevented the migrants from forming true in-depth relations, which would have eliminated the problem of 'too strong emotional involvement'.

Theoretical implications

From the theoretical perspective, hospitality, even if noble, turned out to be always conditional, as Derrida predicted. This main finding is not compatible with the widespread 'romanticised discourse'. First, because the hosts often judged their guests and were disappointed by their decisions, they did not treat their guests as their equals, even if they did their best to treat them respectfully. Secondly, many hosts were proud of their support and could openly and narcissistically present themselves as being hospitable so, in a sense, they were not selfless. On the other hand, the guests were also not passive in their relationships with their hosts. They often felt the 'debt of hospitality' (Chan 2005: 21) due to the support they received from these strangers; thus,

being subordinated or, on the contrary, when transgressing some rules, they were subordinating the hosts – for example, when the latter were unable to impose their home rules or co-experienced their guests' problems and had to perform emotional work for the good of their guests while neglecting their families or their own emotional well-being. In this sense, hosts and guests turned out to be mutually constitutive of each other, as the post-Derridean theory anticipated. The point is not to blame either the hosts – who might have been just overwhelmed by the situation they encountered – or the forced migrants, who might have had various rational and emotional reasons to behave in a non-standard way and could experience cognitive dissonance as they had been raised in different cultural settings. Furthermore, often the culpability for many problems cannot be easily attributed to either guests or hosts. The *losing the sense of being at home*, as I suggested, may be equally caused by either the guest's transgressions or by the hosts themselves – or, more precisely, by their willingness to be ideal hosts. However, it can also be the result of the mere event of an unexpected contact with the Other. Neither the interviewees, nor I, aimed at spreading anti-Ukrainian stereotypes (see Obara 2022). On the contrary, recognition of the difficulties may urge policymakers to prepare for the next waves of refugees, whether in Eastern Europe or elsewhere.

These findings stem from the host's perspective, which may be very different from the guest's view. This explorative study focused on the former for two reasons. First, due to ethical standards, it was not possible to interview the refugees as early as the hosts because the stress and emotional state of the hosts were presumably incomparable to the burden resting on the guests, who could have been interviewed only with special precautions (e.g. the availability of psychological assistance). Secondly, we aimed to capture the unique experience of the hosts who invited strangers to their homes in a country which rarely welcomes refugees with open arms (Babakova, Fiałkowska, Kindler and Zessin-Jurek 2022; Jasiewicz and Jasiewicz-Betkiewicz 2022). This paper is the starting point for the painting of a fuller picture, which would also include the testimonies of the guests.

Concluding remarks

The study identified 6 types of 'difficulty' associated with negotiating everyday routines, dealing with difficult life situations and stress, quarrels and divisions among migrants, neglecting one's own family, a too-strong emotional attachment to one's guests and irreconcilable sets of expectations. The occurrence of these threads suggests that, despite good intentions, the home accommodation of refugees can be, at best, a temporary solution. The micro-relations between hosts and guests were complicated by various factors – additional stress or the disruption of daily routines as well as responsibilities related to social roles such as parenthood. Furthermore, if the power imbalance, as theorised by Derrida, disturbed even some hosts (having more symbolic control over the situation), the chances are that the experience of being a guest is highly likely to be framed by 'hostipitality'.

The analysis of the multifaceted hospitality in this paper was based on the narratives of women who inhabited a particular region of Poland in very specific political circumstances. For that reason, further research should be conducted to put these findings into a comparative context. Firstly, the narratives of hosts from other parts of the country can be different. By focusing on the border region of Podkarpacie, the paper discussed the hospitality in non-metropolitan areas, which might be very different from the findings based on studies in Warsaw or Krakow – the largest cities being prime destinations for Ukrainian refugees. Secondly, judging from the composition of the support groups, which mushroomed in those days on Facebook and other social media and attracted mainly women, the gender dimension is less likely to skew this sample (but without comparative material, we cannot know that for sure). Thirdly, the hosts who shared their accounts did so in a particular historical situation, so a return to the same interviewees seems to be much needed in order to see

how these opinions have evolved over time. Fourth, based on qualitative material, it was not possible to assess the scale of the difficulties discussed or to give precise reasons why, in some cases, they did not occur. Was the guests' stay really easy enough to cope with? What was the role of specific intra and individual factors, usually researched by psychologists than rather sociologists (Bernardi *et al*. 2019)? Was it, perhaps, just the artifact of the method that made some interviewees feel uneasy about discussing unpleasant experiences? Regardless of these doubts, the main finding of this paper – that such difficulties do occur, even if the vast majority of hosts and guests have the best intentions – seems unthreatened. It is highly desirable, however, to further explain the nuances associated with the occurrence of problems. Fifth, in order to understand the complexity of the situation, apart from the challenges discussed in this paper, a focus on the structural features which enabled hospitality is much needed (How did the hosts and guests meet? What was the demographic profile of the host?) and the positive sides of home accommodation. It should be stressed that, even if evident, the difficulties analysed co-existed with many good memories; former hosts, although tired, did not preclude the possibility of hosting other refugees in the future – interestingly, not only Ukrainian refugees but also Syrian ones – as they declared in answer to one of the interview questions. Finally, it is crucial to hear the perspectives of hosts and guests around the same concerns. The team members are now gathering the testimonies of Ukrainian guests in order to achieve this aim. The emerging literature on home accommodation should enable us to pose more general questions such as, *inter alia*, What factors facilitate home accommodation? Should we prioritise some refugees over others? On what grounds? Who should support the hosts and how? How should host and guests negotiate home rules?

Notes

1. The national identification number used in Poland. Ukrainians who crossed the Polish border after the Russian invasion could also apply for PESEL.
2. In this paper I use the term refugee in a broad sense, to denote everyone who fled their country to escape war, regardless of their legal status.
3. The project was based on standard procedures known from qualitative migration research, including oral informed consent (recorded) and the pseudonymisation of the data. In rare cases, the team decided not to publish particular excerpts in order to protect the privacy of the interviewees.
4. Interviewers included the Author of this paper, another experienced female social scientist and students who had undergone rigorous methodological and ethical training – 2 men and 1 woman. They were all Polish nationals, unlike the interviewer responsible for the second part of the project – interviews with refugees.

Funding

This work was generously supported by the Polish National Agency for Academic Exchange (NAWA). Grant number: BPN/GIN/2022/1/00106.

Acknowledgements

I would like to thank Izabela Lenczowska for her invaluable assistance in the process of data cleansing. I would also like to thank Iwona Leonowicz-Bukala, Bartlomiej Godzisz and Bartlomiej Mazur for their work and commitment to the project.

Conflict of interest statement

No conflict of interest was reported by the author.

ORCID ID

Kamil Łuczaj https://orcid.org/0000-0002-1603-3259

References

Ahmed S. (2000). *Strange Encounters*. London: Routledge.

Archer M. (2007). The Trajectory of the Morphogenetic Approach. *Sociologia, Problemas e Práticas* 54: 35–47.

Babakova O., Fiałkowska K., Kindler M., Zessin-Jurek L. (2022). Who Is a 'True' Refugee? On the Limits of Polish Hospitality. *CMR Spotlight* 6(41): 1–14.

Bassoli M., Campomori F. (2022). A Policy-Oriented Approach to Co-Production. The Case of Homestay Accommodation for Refugees and Asylum Seekers. *Public Management Review* 1–23. DOI: 10.1080/14719037.2022.2121978.

Bassoli M., Luccioni C. (2023). Homestay Accommodation for Refugees (in Europe). A Literature Review. *International Migration Review*. DOI: 10.1177/01979183231172.

Bernardi L., Huinink J., Settersten R. (2019). The Life Course Cube: A Tool for Studying Lives. *Advances in Life Course Research* 41: 1–13.

Bida A. (2018). Derrida and 'Hostipitality', in: A. Bida (ed.), *Mapping Home in Contemporary Narratives*, pp. 119–131. Cham: Palgrave Macmillan.

Beyer G. (1981). The Political Refugee. *International Migration Review* 15(1–2): 26–34.

Blumell L.E., Bunce M., Cooper G., McDowell C. (2020). Refugee and Asylum News Coverage in UK Print and Online Media. *Journalism Studies* 21(2): 162–179.

Boroń A., Gromkowska-Melosik A. (2022). *Ukraińskie Uchodźczynie Wojenne. Tożsamość, Trauma, Nadzieja*. Warsaw: Oficyna Wydawnicza 'Impuls'.

Braun V., Clarke V. (2022). *Thematic Analysis: A Practical Guide.* London: Sage.

Bukowski M., Duszczyk M. (eds) (2022). *Hospitable Poland 2022+*. Warsaw: WiseEuropa. https://wise-europa.eu/wp-content/uploads/2022/06/Raport-Goscinna-Polska-2022.pdf (accessed 10 October 2022).

CBOS (2022). *Polacy Wobec Wojny na Ukrainie i Ukraińskich Uchodźców.* Warsaw: Fundacja Centrum Badania Opinii Społecznej. https://www.cbos.pl/SPISKOM.POL/2022/K_101_22.PDF (accessed 20 September 2022).

Cieśla A. (2022). Test Bez Zapowiedzi. *Polityka* 13: 33–35.

Chan W. (2005). A Gift of a Pagoda, the Presence of a Prominent Citizen, and the Possibilities of Hospitality. *Environment and Planning D: Society and Space* 23(1): 11–28.

Charmaz K. (2006). *Constructing Grounded Theory*. London-Thousand Oaks-New Delhi: Sage.

Derrida J. (1999). *Adieu to Emmanuel Levinas*. Stanford: Stanford University Press.

Derrida J. (2000). Hostipitality. *Angelaki. Journal of the Theoretical Humanities* 5(3): 3–18.

Dey I. (1999). *Grounding Grounded Theory*. San Diego: Academic Press.

Dikeç M. (2002). Pera Peras Poros: Longings for Spaces of Hospitality. *Theory, Culture & Society* 19(1–2): 227–247.

Dinçer O.B., Federici V., Ferris E., Karaca S., Kirişci K., Çarmıklı E.Ö. (2013). *Turkey and Syrian Refugees: The Limits of Hospitality*. Washington DC: Brookings International Strategic Research Organization (USAK).

Fullin G., Reyneri E. (2011). Low Unemployment and Bad Jobs for New Immigrants in Italy. *International Migration* 49(1): 118–147.

Gibson S. (2003). Accommodating Strangers. *Journal for Cultural Research* 7(4): 367–386.

Golczyńska-Grondas A. (2022). Społeczny Rynek Współczucia, Targi o Współczucie i Społeczna Przestrzeń Zinstytucjonalizowanej Bezkarności. Kryzysy Humanitarne w Polsce w Latach 2021–2022. *Przegląd Socjologiczny* 71(3): 115–137.

Gu M.M., Lee J.C.-K. (2019). Migrating Capital and Habitus. *Ethnic and Racial Studies* 43(10): 1–21.

Jasiewicz K., Jasiewicz-Betkiewicz A. (2022). Poland: Political Developments and Data in 2021. *European Journal of Political Research Political Data Yearbook* 61(1): 362–373.

KAI (2022). Ks. Prof. Cisło o Pomocy Ukrainie: Najbiedniejsi Zostali w Kraju. https://www.ekai.pl/ks-prof-cislo-o-pomocy-ukrainie-najbiedniejsi-zostali-w-kraju/ (accessed 16 May 2023).

Kalinowska K., Kuczyński P., Bukraba-Rylska I., Krakowska K., Sałkowska M. (2023). *Społeczeństwo Łatwopalne. Doświadczenie Wojny i Pomaganie Uchodźcom Wojennym z Ukrainy*. Warsaw: Wydawnictwo Naukowe Scholar.

Kohlenberger J., Pędziwiatr K., Rengs B., Riederer B., Setz I., Buber-Ennser I., Brzozowski J., Nahorniuk O. (2022). *What the Self-Selection of Ukrainian Refugees Means for Support in Host Countries.* https://blogs.lse.ac.uk/europpblog/2022/09/07/what-the-self-selection-of-ukrainian-refugees-means-for-support-in-host-countries/ (accessed 31 October 2023).

Kvale S. (1996). *Interview Views.* Thousand Oaks, CA: Sage.

Kyriakidou M. (2021). Hierarchies of Deservingness and the Limits of Hospitality in the 'Refugee Crisis'. *Media, Culture and Society* 43(1): 133–149.

Laachir K. (2007). Hospitality and the Limitations of the National, in: J. Germann Molz, S. Bibson (eds), *Mobilizing Hospitality. The Ethics of Social Relations in a Mobile World*, pp. 177–190. Farnham: Ashgate.

Lampe J. (2014). *Balkans into Southeastern Europe: A Century of War and Transition*. New York: Palgrave Macmillan.

Lareau A. (2002). Invisible Inequality. *American Sociological Review* 67(5): 747–776.

Luczaj K., Leonowicz-Bukala I., Kurek-Ochmanska O. (2022). English as a Lingua Franca? The Limits of Everyday English-Language Communication in Polish Academia. *English for Specific Purposes* 66: 3–16.

Maja A. (2023). Bogaci Ukraińscy Uchodźcy Napędzają Polskie Luksusowe Biznesy. https://www.humanmag.pl/bogaci-ukrainscy-uchodzcy-napedzaja-polskie-luksusowe-biznesy/ (accessed 16 May 2023).

Martiniello M., Rea A. (2014). The Concept of Migratory Careers. *Current Sociology* 62(7): 1079–1096.

Mason V. (2011). The Im/mobilities of Iraqi Refugees in Jordan: Pan-Arabism, 'Hospitality' and the Figure of the 'Refugee'. *Mobilities* 6(3): 353–373.

Merikoski P. (2021). 'At Least They Are Welcome in my Home!' Contentious Hospitality in Home Accommodation of Asylum Seekers in Finland. *Citizenship Studies* 25(1): 90–105.

Merikoski P. (2022). Living Together Through the Asylum Process: Affective Proximity in Home Accommodation of Asylum Seekers. *Sociology* 56(6): 1200–1216.

Metzgar J. (2021). *Bridging the Divide: Working-Class Culture in a Middle-Class Society*. New York: Cornell University Press.

Morawska E. (2000). Intended and Unintended Consequences of Forced Migrations. *International Migration Review* 34(4): 1049–1087.

Obara K. (2022). Niewdzięczni Uchodźcy z Ukrainy. Pomyśl, Zanim Opiszesz Swoją Historię. *Homo Digital*. https://homodigital.pl/niewdzieczni-uchodzcy-z-ukrainy-pomysl-zanim-opiszesz-swoja-historie/ (accessed 22 September 2022).

Riabchuk M. (2015). 'Two Ukraines' Reconsidered. *Studies in Ethnicity and Nationalism* 15(1): 138–156.

Rice-Oxley M. (2022). Poland Has Worked a Refugee Miracle. But How Much Longer Can It Last? *The Guardian*, 6 April. https://www.theguardian.com/global-development/2022/apr/06/poland-has-worked-a-refugee-miracle-but-how-much-longer-can-it-last (accessed 20 September 2022).

Roberts R. (2019). *Ongoing Mobility Trajectories Lived Experiences of Global Migration*. Singapore: Springer Nature.

Rohwerder B. (2018). *Syrian Refugee Women, Girls, and People with Disabilities in Turkey, K4D Helpdesk Report*. Brighton, UK: Institute of Development Studies.

Rozakou K. (2012). The Biopolitics of Hospitality in Greece: Humanitarianism and the Management of Refugees. *American Ethnologist* 39(3): 562–577.

Said E. (1978). *Orientalism*. London: Penguin.

Santos-Silva D., Guerreiro D. (2020). Media and Forced Migrations: Social Representations of Refugees in the Portuguese Media in Two Mediatic Peaks. *Comunicação e Sociedade* 38: 123–137.

Still J. (2007). Figures of Oriental Hospitality: Nomads and Sybarites, in: J. Germann Molz, S. Bibson (eds), *Mobilizing Hospitality. The Ethics of Social Relations in a Mobile World*, pp. 193–208. Farnham: Ashgate.

Sowa A. (2022). Nasi Nowi Domownicy. *Polityka* 13: 17–19.

Stola D. (1992). Forced Migrations in Central European History. *International Migration Review* 26(2): 324–341.

Szulanski G. (1996). Exploring Internal Stickiness. *Strategic Management Journal* 17(S2): 27–43.

Tönnies F. (1887/2021). *Community and Society*. Bristol: Mockingbird Press.

Unia Metropolii Polskich (2022). *Raport 'Miejska Gościnność'*. https://metropolie.pl/artykul/raport-miejska-goscinnosc-wielki-wzrost-wyzwania-i-szanse (accessed 12 October 2022).

Urazińska A. (2022). Odda Pralkę, za Darmo. Ale 'Nie Ukraińcom'. Wzrasta Fala Nastrojów Antyukraińskich. *Gazeta Wyborcza*, 20 September. https://lodz.wyborcza.pl/lodz/7,35136,28928438,chce-za-darmo-oddac-pralke-ale-nie-ukraincom-historyk.html (accessed 21 September 2022).

Valenta M., Jakobsen J., Župarić-Iljić D., Halilovich H. (2020). Syrian Refugee Migration, Transitions in Migrant Statuses and Future Scenarios of Syrian Mobility. *Refugee Survey Quarterly* 39(2): 153–176.

Yıldız A., Uzgören E. (2016). Limits to Temporary Protection: Non-Camp Syrian Refugees in İzmir, Turkey. *Southeast European and Black Sea Studies* 16(2): 195–211.

Appendix 1

Table 1. Basic characteristics of the interviewees

ID	Pseudonym	Gender	Age	Family situation	Hosting period (all guests combined)	Type of premises	Location	Occurrence of problems in the interview
G1	Jadwiga	Female	40s	Household with children	More than 3 months	Own house	Village near Rzeszow	High
G2	Alicja	Female	20s	Household with children	More than 3 months	Own house	Village near Rzeszow	Moderate
G3	Magdalena	Female	60s	Household no children	Up to 3 months	Own house	Village near Rzeszow	High
G4	Damian	Male	50s	Household with children	More than 3 months	Own house	Village near Rzeszow	Moderate
G6	Emilia	Female	60s	Household no children	Up to 2 months	Own house	Village near Rzeszow	Moderate
G7	Aleksandra	Female	40s	Household with children	Up to 2 months	Own house	Rzeszow	Low
G8	Klementyna	Female	30s	Household with children	Up to 2 months	Own apartment	Rzeszow	Moderate
G9	Eliza	Female	30s	Household no children	Up to 2 months	Spare apartment	Rzeszow	Moderate
G10	Yulia	Female	20s	Household with children	Up to 1 week	Own apartment	Rzeszow	Low
G11	Aniela	Female	50s	Household no children	More than 3 months	Own house	Village near Rzeszow	High
G13	Karolina	Female	50s	Household with children	More than 3 months	Own house	Village near Rzeszow	Low
G14	Maria	Female	60s	Household no children	Up to 2 months	Own house	Village near Rzeszow	Low
G15	Matylda	Female	40s	Household with children	More than 3 months	Own house	Village near Rzeszow	Low
G16	Marcelina	Female	40s	Household no children	More than 3 months	Own house	Rzeszow	Moderate
G17	Maryna	Female	70s	Household no children	Up to 1 month	Own house	Rzeszow	Low

How to cite this article: Luczaj K. (2024). Multifaceted Hospitality. The Micro-Dynamics of Host–Guest Relations in Polish Homes after 24 February 2022. *Central and Eastern European Migration Review* 13(1): 25–45.

Central and Eastern European Migration Review
Received: 10 October 2022, Accepted: 30 June 2024
Vol. 13, No. 1, 2024, pp. 47–68
doi: 10.54667/ceemr.2024.10

Changes in the Involvement of Polish Local Governments in Public Policies Addressing Involuntary Migration Following the 2022 Inflow of Ukrainian Forced Migrants

Wiktor Magdziarz*

This paper analyses the changes in the involvement of Polish local governments in the system of public policies addressing the needs of forced migrants in Poland. The driver of such changes was the humanitarian emergency connected to the influx of Ukrainian forced migrants in 2022, which followed the Russian full-scale invasion of Ukraine. In a multi-level governance context, the article unpacks the policy-change process, discussing the interplay between the Polish public-policy system, the political context, the state polity, and local governments' activity. During the humanitarian emergency, the external circumstances for local governments' operations altered. Many local authorities attempted to expand their involvement, while sometimes questioning the inter-institutional power balance. The functional role – the scope of their responsibility and the activities that they undertake – of local governments in the discussed policy system was temporarily extended. Moreover, in the context of power relations between the actors of the policy system, their structural position vis-à-vis other stakeholders was redefined, as their agency and political impact increased. This article concludes that the above, mostly temporary, changes will have implications for the broader development of the Polish migration-policy system, resulting in Polish local governments inflicting greater political impact on such a system in the future, while also maintaining increased activity around policies addressing forced migrants.

Keywords: forced migration, 2022 Russian invasion of Ukraine, local government, policy change, multi-level governance (MLG)

* Center for Advanced Studies of Population and Religion (CASPAR), Cracow University of Economics, Poland. Addresses for correspondence: wiktor.magdziarz@gmail.com.

Introduction

While the post-1989 decentralisation of the Polish public-governance system provided Polish local governments with relatively wide discretion in public management (Swianiewicz 2014; 2019), their prerogatives around refugee and migration policy-making remained limited (Buraczyński 2015). The development of migration and refugee policies in Poland had a centralised, top-down character, with the Polish Ministry of the Interior assuming the key role (Szonert and Łodziński 2016). The previous years, however, saw some changes to the above picture. These were prompted by an increase in the immigration of Ukrainians to Poland since 2015, the lack of an explicit state-level strategy on immigration and, thirdly, the discrepancy between the agenda of the conservative Law and Justice government and the policy needs in large Polish cities. The above stimulated the development of local migration policies – e.g. in cities such as Gdańsk, Wrocław, Warsaw or Cracow. Cooperation between local governments and NGOs were a primary driver for such developments (Matusz-Protasiewicz and Kwieciński 2018; Wach and Pachocka 2022). As suggested by Cichocka *et al*. (2022), the changing migration profile of Poland to some extent necessitated such a response from some local governments and their civil-society partners. Notably, the emergence of the Polish *Willkommenskultur* – referring here to the German concept which best translates as *welcome culture* – which rose in prominence particularly around 2015, in the context of the mass influx of forced migrants in Europe, mostly in urban settings, palpably decoupled in that period from the far-right government's xenophobic, anti-refugee narrative and a securitarian policy agenda (see Klaus, Lévay, Rzeplińska and Scheinost 2018; Szonert and Łodziński 2016), particularly around the 2015 parliamentary elections campaign.

In early February 2022, Russia invaded the whole territory of Ukraine, forcing 3 million people, 95 per cent of whom were Ukrainian citizens, to cross the Polish border between late February and April 2022 (Duszczyk and Kaczmarczyk 2022). This resulted, in Poland, in a tangible humanitarian emergency across the country. The notion of a humanitarian emergency denotes in this context a set of new challenges for public-policy stakeholders, connected to the need to urgently assist an unprecedented (in the Polish context) number of forced migrants – with the support ranging from basic social aid to the fostering of newcomers' socio-economic integration.

While, at that point, the competence of local governments in the area of forced migration remained limited, such an emergency provoked many (often temporary) developments of a legal, institutional and societal nature. Respectively, in the area of law, one could mention the introduction of a legal act regulating local governments' involvement in supporting Ukrainian forced migrants, the establishment of new legal pathways enabling local governments to devote financial assets to supporting forced migrants or the loosening of regulatory constraints on local governments' finances. In terms of institutional developments, there has been an intensification in the communication between local and central government – or the reinforcement of grassroots, semi-formal cooperation on a local level. On a societal level, one could mention the severity, mass-scale and dispersed nature of the cited humanitarian emergency, as well as its wider social perception in Polish society.

The above developments impacted on local governments' functioning, changing the situation in the key areas that their representatives must take into consideration when they decide whether or not to get involved in specific policy issues. Among such areas one can mention, firstly, local governments' finances (e.g., an increased discretion in the funding of support for forced migrants and the availability of additional funding to cover extracurricular expenses). Secondly, the relevant law regulating local governments' activities (most importantly, greater managerial leeway on the part of local authorities, resulting from the temporary assignment of new formal prerogatives to local authorities – but also an informal acquiescence for them to undertake the steps necessary to support Ukrainian migrants). Thirdly, local authorities' horizontal and vertical relationships with other policy stakeholders (e.g., the reinforcement of local governments' institutional

bargaining power and the strengthening of local authorities' external cooperations). Then, the societal context of their work also changed significantly – most importantly due to the public furtherance for the state's involvement in the provision of support to forced migrants. Finally, there were changes to local authorities' in-house capacity – based on an *ad-hoc* mobilisation of in-house resources around the discussed policy issue, on a development of institutional capital based on a new, hands-on experience of working with forced migrants or on a greater availability of external expertise.

To sum up, the analysed changes provoked local governments to step in, impacting on their engagement with the system of forced-migration policies and, as a result, leading to a temporary decentralisation of the system of policies addressing forced migrants in Poland. Indeed, during the emergency, many local governments deployed activities to provide aid to forced migrants. They formally assumed a range of responsibilities from the state authorities and performed an even more extensive range of tasks on an informal basis.

This resulted in a change in the structural position of Polish local governments *vis-à-vis* other policy stakeholders. In other words, the formers' agency and political impact increased, in the context of power relations between the actors of the policy system. Moreover, the local governments' functional role within this system was altered – in other words, the scope of their responsibility and the activities that they undertake to contribute to the system's functioning. Such changes, it is argued in this article, are likely to remain a temporary phenomenon. However, some of their implications may be sustained in the future, impacting on the development of a broader migration-policy system in Poland. Notably, local governments can be expected to sustain some of their extended activity around forced-migration policy, while their overall impact on the broader policy system is also likely to increase in the future.

This issue is addressed in this article. In the analysis, I discuss the tenacity of the identified changes and their possible impacts on a broader migration-policy system in Poland. Moreover, looking in depth into the above developments, the article highlights the interplay between the specific activities of Polish local governments, the Polish system of public policies, the country's political context and its polity. Crucially, within a neo-institutional paradigm of analysis, it dissects the process of policy change in the specific context of the above-cited policy system.

The article contributes to the literature exploring the applicability of a multi-level governance (MLG) framework for migration-policy analysis (explored earlier, for example, by Caponio and Jones-Correa 2018). It focuses specifically on a process of policy change within an MLG structure, discussing institutional inter-dependencies in the context of a humanitarian emergency. It helps to address the 'under-theorisation [of] bottom-up processes through which local governments affect national immigration policy, vertical processes connecting local immigration policy to global governance, and horizontal processes connecting multiple local governments' (Filomeno 2017: 6).

The structure of the article is as follows: firstly, the key concepts and the broader theoretical paradigm for the analysis are outlined. Then, the study's methodology, its design and the scope of the analysis are presented. This is then followed with an analysis of the evidence collected and the presentation of results. The penultimate section presents the overall conclusions of the article, before the final one – the discussion – addresses some of the key broader considerations emerging from the analysis.

Concepts, definitions and a theoretical background

Multi-level governance

This study applies a lens of multi-level governance (MLG) to conceptually frame local governments' policy-making engagement alongside a central government. MLG is a form of policy governance where a dispersion of state authority occurs across 'a multiplicity of politically independent but otherwise interdependent actors' (Schmitter 2004: 72), while sub-national actors' leverage over policy management increases (Bache and Flinders 2004). In principle, non-public stakeholders involved in decision-making within an MLG system form relationships with public stakeholders within a framework of 'non-hierarchical networks based on cooperation and consensus building' (Caponio 2021: 1592). As such, 'MLG is not necessarily stateless but it is not wedded to statehood either' (Börzel 2021: 127). MLG co-exists with other forms of governance (Caponio 2021: 1592) and can materialise in a dispersion of state authority, both vertically – to stakeholders on other levels of public administration – as well as horizontally, through a dispersion of state power to non-public stakeholders (Bache and Flinders 2004). Moreover, MLG should be seen as inherently underpinned by power relations and political dynamics and analysed as such (Caponio 2021: 1602–1603). An important feature of MLG is that it constitutes 'at the same time a theory of political mobilization, of policy-making, and of polity structuring' (Piattoni 2010: 26). Such a conceptualisation emphasises that actions undertaken by stakeholders within an MLG system simultaneously interfere with a given political context, with a system of public policies as well as with a polity of a given state.

Stability and changeability of a policy system

This study focuses on the process of a change in a given policy system. To better understand how an interplay between the tenacity of policy structures and stakeholders' pro-active bargaining might challenge or reinforce such structures (hence, possibly prompting a policy reform), I deployed a neo-institutional analytic framework. Therefore, I assume that the boundaries of policy-makers' decisive and executive capabilities and, therefore, the way in which institutions operate, are determined by the interaction of formal and informal elements (Lowndes and Leach 2004). Indeed, an institutional change is understood as 'a creative, negotiated and contested process (...) shaped by institutional constraints in the external political environment and within specific local contexts, [as] institutions have meaning and effect only through the actions of individuals' (2004: 561–563). Alongside regulatory reforms, policy change results from the activities of policy stakeholders who interpret policy frameworks, reinforcing or contesting and redefining established policy structures and hierarchies through their activities and communication acts (see Benz 2019).

The above resonates well with the understanding of policy-making that is seen as organised around a policy path which, in turn, is an 'entrenched way of unifying, organizing, and regulating a certain policy field [being in fact a] discursive terrain'. Such 'structured coherences' (Torfing 2001: 288) increase the likelihood that certain patterns of interdependencies between stakeholders (sets of power relations) will be maintained in an ongoing, iterative process of reproduction and transformation. Such constellations are then challenged by policy stakeholders engaging in path-shaping (2001: 289). A policy reform occurs through the 'dislocation' of a policy path, where the challenges that cannot be mitigated by the system in place lead to the 'dissolving of the structured coherence of a policy path, [while] sedimented institutions become destabilised, and fixed meanings start to float' (2001: 288). This allows for a political disarticulation and rearticulation and a window of opportunity opens for new agencies to push for policy changes.

Regarding local governments, arguably the key structural changes resulting from the above developments, within a specific policy system where local governments are involved, can be interpreted as a movement either

towards centralisation or towards decentralisation. In that context, building on Rondinelli's understanding of decentralisation (1999: 2), the following definition of this process was adopted for this study: decentralisation is a redistribution of 'authority, responsibility and financial resources for providing public services among different levels of government' and to other stakeholders involved in public decision-making.

Design of the study and research methods

Three qualitative research methods were used in this study, following an exploratory-sequential design. Firstly, a qualitative systematised review of the literature was conducted, covering academic articles, grey literature and (local) media sources on the development of Polish migration and refugee policy over the last two decades (including local governments' involvement) as well as the evolution of the Polish local governance system since the late 1990s, with a specific focus on the period from 2015 onwards. The non-systematic overview of the literature covered local governments' participation in migration policy-making in the context of MLG systems, provided a point of reference for the analysis and generated hypotheses for my own study. The reviewed legal framework covered Polish laws directly and indirectly regulating the functioning of local governments, as well as the legal measures addressing both voluntary migrants and forcibly displaced persons in Poland. Additionally, the regulations introduced in Poland in response to the 2022 humanitarian emergency have been reviewed. On top of that, 10 semi-structured, online interviews with policy stakeholders were conducted, following a purposive sampling logic. The consultees included representatives of local governments and local government associations (in villages, towns and large and small cities, across different regions of Poland), NGOs and academic experts (see Table A1). Several persons consulted for the study performed more than one of the above roles, holding policy-expertise based on their involvement in different institutional roles and, hence, providing a multi-dimensional view to the circumstances under analysis.

These research methods were chosen to reflect the theoretical paradigm for the analysis. They provided me with an insight into the formal and informal factors that impact on stakeholders' involvement in the discussed policy. The chosen methodology allowed me to capture the subjective viewpoint of the stakeholders involved (through the interviews and the analysis of stakeholders' public communication), the broader societal context of their activity (the analysis of media sources and the review of the academic and grey literature) and the legal-institutional framework for their activity (the legal framework analysis). The choice of resources and materials to be reviewed and the sampling of the stakeholders to be consulted, allowed me to examine the situation at different levels of public governance. This reflected the study's focus on the MLG characteristics of the analysed policy system with the aim of capturing inter-dependencies between such different levels.

When it comes to the scope of the study, the core analysis covers the period from February until October 2022. The study addresses stakeholders' policy-making and policy-implementation activities, as well as a range of *ad-hoc* activities in which local governments engage when responding to the emergency under discussion. In some cases, such activities were then sanctioned by law. Their implementation intertwined with the deployment of formalised policies. It also activated bottom-level stakeholders and provided room for the political agendas of local governments to be substantialised and reasserted – thus contributing to path-shaping in the area of migration policy.

The article refers to 'policies addressing forced migrants', meaning a diverse set of policies addressing the needs of persons who arrived in Poland having experienced non-voluntary migration. While a majority of forced migrants who arrived in Poland in 2022 were addressed in the *Act of 12 March 2022 on Support for the Nationals of Ukraine* – this act transposed into Polish law the Temporary Protection Directive (TPD) 2001/55/EC – the situation for such individuals was different to that for asylum-seekers or refugees. In such a context, it should be noted that the activities of local governments, described in this article, mostly addressed

the Ukrainian beneficiaries of the TPD 2001/55/EC. In this article, however, I argue further that the analysed developments might result in sustained changes to local governments' involvement around forced-migration policy and, moreover, might impact on diverse groups of migrants, beyond TPD 2001/55/EC beneficiaries only.

As the study was initially carried out as part of a Master's course at the London School of Economics and Political Science, its plan and methodological approach were subject to a standard ethical verification procedure at the LSE, having received approval from a responsible body at the university.

Analysis and results

This part of the article presents the analysis of the findings from the study and the results. The strategy for the analysis derived from a neo-institutional conceptual paradigm deployed for the study. Accordingly, it was assumed that, in order to understand how local governments manage their involvement in the discussed policy system, it is necessary to capture the dynamics of an ongoing redefinition of inter-institutonal power relations therein – between different levels of the MLG system. It was assumed that such a pattern of relations and, hence, the interdependencies between local authorities and other stakeholders, would be determined both by structural factors in place and by the activities deployed by local authorities in relation to such circumstances. Hence, the analytic framework was designed in a way that allows it to capture how local governments, through the actions of their representatives, are impacted on by the framework conditions in which they operate and, at the same time, how local governments position themselves when confronted with such conditions, in the context of perceived opportunities and barriers, with the ultimate goal of achieving the best possible bargaining position within the policy system.

Accordingly, under such a framework, four broad areas of interest were identified for the analysis. Each of them is constituted by a group of factors that local governments have to consider when managing their involvement in policies addressing forcibly displaced persons. The cited typology was derived from an inductive analysis of the data collected in the study. It provides a structure for the analysis and allows for the integration of all the relevant evidence.

The first group of factors is constituted by the issues around the legal framework. The second group covers issues around finance. The third category includes relationships and communication between local governments and the state government, as well as relationships between local governments and residents in their respective local areas. Finally, the last group is constituted by issues around cooperation between local governments, their local partners (including local government associations, other local government units and CSOs) and their partners abroad. This part of the analysis touches upon earlier cooperation within such inter-institutional networks and the role of capital generated on the basis of such experiences.

For each of those categories, the analysis discusses the background situation and the changes that occurred after February 2022. I show how such changes observed in the study (or the lack thereof, where none were identified) impacted on local governments' involvement in policies addressing forced migrants. Wherever possible, in the context of the discussed humanitarian emergency, the analysis explores an interplay between, on the one hand, the tenacity of the existing structures and practices and local governments' activities that either challenged or mobilised and reinforced them, on the other.

Legal framework regulating local governments' involvement in forced migration

Starting with the background legal framework for the Polish local-governance system, it should, firstly, be explained that, in Poland, such a system consists of three tiers. These include: 16 regions or voivodships (in

Polish: *województwo*), each of which is divided into counties (in Polish: *powiat* – there are 314 counties in total) and the latter then split into municipalities (in Polish: *gmina* – 2,477 in total) (Sekuła 2016: 67). Both the remit of Polish local governments and their discretion in public management (under the unitary state polity) are determined by the existing legal framework – namely, the acts on: *Municipal Governments (1990)*, *County Governments (1998)* and *Regional Governments (1998)*.

Based on the above acts (respectively: 1990: Art. 7–8; 1998: Art. 4; 1998: Art. 14) and the Polish Constitution (Art. 146 1–2; Art. 163–166), local governments must take responsibility for those elements of 'public matters' pertaining to 'the matters connected to the local governments' communities' but not for 'state policy' (Izdebski and Kulesza 1999: 131). A broad range of responsibilities is defined through an explicit enumeration only for Polish counties. Municipal and regional governments' responsibilities are defined through general clauses instead. Based on these, municipalities and regions should address 'municipal matters' and 'regional matters", respectively (Izdebski and Kulesza 1999: 131). Local governments can also be commissioned to perform additional tasks, based on separate legal acts. Local authorities' tasks are then categorised as their *own tasks* or *commissioned tasks*. The first tasks 'aim at meeting the needs of a local government's community' and the latter are state policy-related tasks transferred to local governments. *Commissioned tasks* are financed by the central government, while local governments' *own tasks* should be financed from their own budgets (Małecka-Łyszczek 2013). The Polish Constitution guarantees that local governments will be provided with sufficient resources to deliver their *own* tasks. Importantly, for municipal governments (the lowest level of the Polish local-governance system), some of their own are defined as *obligatory* and some as *non-obligatory* – and municipalities are obliged to deliver the first, whereas delivery of the latter is 'dependent on needs and financial capabilities of a given unit' (2013: 62).

None of the laws discussed above specifically include refugee- and immigration-related tasks in the range of local governments' responsibility. Some of such tasks, however, were commissioned to local governments through separate acts, most importantly the *Act of 12 March 2004 on Social Assistance*. This regulation obliges institutions of all three tiers of the local-governance system to fulfill the basic social needs of eligible individuals, on a local scale (Art. 3; Art. 16). Delivery of most of the social-service-related tasks was commissioned to counties and municipalities in the form of their *own* or *commissioned* tasks. For municipalities, some of these tasks were also made *obligatory* (*1998 Act on County Government*: Art. 19–20; *1990 Act on Municipal Government*: Art. 17–18). Generally speaking, the act qualifies foreigners who have certain residence statuses to access social services provided on the territory of Poland. Article 5, indeed, lists such eligible statuses, including, for instance, refugee status, subsidiary protection status or a residence permit granted on a humanitarian basis.

Having said that, however, the Polish law, to some extent, empowers local governments to implement social-policy measures of their own choice, with a certain degree of discretion and autonomy. Based on the constitutional rule of the *presumption of tasks* (The Polish Constitution of the 2nd of April 1997, Chap. 7, Art. 163), local governments are allowed to perform any such public tasks that are not explicitly reserved for the remaining public authorities. Municipalities are additionally expected to fulfill any local-governance-related tasks that are not commissioned by the two other tiers of a local government (1997, Art. 164.3). Empowered to autonomously shape public policy on a local scale, municipalities benefit from a relatively wider autonomy than regions and counties, even if their discretion is still limited (see Jaworski 2020; Korczak 2020; Kotarba 2016).

Legal framework introduced after February 2022 to regulate local governments' involvement in forced migration

In response to the humanitarian emergency of February 2022, some changes to the described legal framework were introduced. Crucially, Polish local governments were assigned with additional prerogatives and tasks based on the *Act of 12 March 2022 on Support for the Nationals of Ukraine…*[1] As a result, their autonomy formally increased and their capacity around development of policy initiatives addressing the needs of forced migrants was extended. Indeed, local governments performed a range of tasks resulting from the above-mentioned legal changes. At the same time, they also actively sought legal pathways to step in such cases, where certain forms of involvement were not explicitly backed by the existing legal framework, while they were seen as vital 'on the ground'. Some activities were also undertaken informally.

Most importantly, in this context, the legal Act of 12 March commissioned Polish local governments (municipalities to a great extent), to undertake a range of tasks aimed at aiding the newly arrived forced migrants on an *ad hoc* basis, 'within the remit of [local governments'] financial capabilities and based on their own initiative' (Art. 12.4). Local authorities were allowed to determine the specific scope, form and mode of delivery of such support (Art. 12.5).[2] The tasks outlined in the regulation included, *inter alia*, the registration and issuing of residence documents (Art. 4.1–4.2), the provision of financial support to local dwellers who hosted Ukrainians (Art. 13.1) and to displaced Ukrainians themselves (Art. 31), the provision of psychological support (Art. 32), guardianship over unaccompanied minors (Art. 25) or the provision of education and support in education (Art. 50, 52, 53). Beyond that, local governments could deploy an array of basic social-support initiatives (Art. 12.4) – for example, covering accommodation, medical care, alimentation, transport and hygiene (Art. 12.1.1–7). Importantly, they could also undertake any 'other actions necessary for the provision of support' (Art. 12.1.8). Finally, local governments could provide the displaced persons (defined in line with the *Council Directive 2001/55/EC*)[3] with the social (Art. 29) and financial (Art. 26) support available to Polish citizens, including that based on the above-mentioned 2004 *Act on Social Assistance*. Overall, local governments were commissioned to deliver their usual public services to forced migrants too, including the delivery of local authorities' respective *obligatory* tasks.

One of the interviewed local-government representatives noted that Ukrainian forced migrants were officially recognised by the Polish administrative system and were provided with PESEL numbers (the Polish personal administrative identification number). Such a formal recognition translates into the assignment of legal residence status to individuals, thus allowing local authorities to address such persons with public-funded support. At the same time, the provision of support to foreigners who do not benefit from formal recognition by the state is not imposed on Polish local governments through any of the local government laws, the 2004 *Act on Social Assistance*, the 2013 *Act on Foreigners* nor the 2003 *Act on Provision of Protection to Foreigners on the Territory of the Republic of Poland.*

One example of a legal solution developed in response to the 2022 emergency allowed Lublin's authorities to employ Ukrainian teachers, thus removing a formal difficulty around employing foreigners in the Polish system of education. This step was possible thanks to the adjustment of the existing regulation established to support the Roma minority. The regulation's scope was expanded to hire Ukrainian-speaking teachers 'in the capacity of non-Roma assistants'.[4] According to one interviewee, 'The city of Lublin, already in March [2022], in cooperation with the Polish Center for International Aid, hired the first 50 teachers in local schools'. The interviewee explained that such ingenious legislative solutions tend to be shared among Polish local governments, who frequently support each other through exchanging knowledge – and went on to suggest that:

> *In our capacity as local governments, we cooperate and exchange experiences, under the umbrella of the Association of Polish Cities, or in the Union of Polish Metropolises. (…) The solution regarding Ukrainian teachers was deployed across Poland and resulted in the hiring of more than 1,000 teachers across the country.*

Some local governments in large cities deployed and upscaled their own local policy frameworks addressing migrants. Such frameworks had already been primarily developed in the years preceeding the 2022 invasion. For instance, according to one of the interviewed public officials, the local migration policy structures in Cracow had been established because the local authorities there had been 'pragmatically seeking the legal basis that would enable [them] to work locally on the integration of foreigners'. Such policy structures in large cities served some local governments as a formal basis for the immediate deployment of support to foreigners, immediately after the mass influx of forced migrants commenced in February 2022. In some cases, such structures were then upscaled and adjusted to respond to the new challenges – most notably, to foster the socio-economic integration of forced migrants.

Another example that can be cited in this context is the informal relocation of displaced persons within Poland. Some interviewees stated that they had been forbidden by the central government's regional representatives to get involved in this type of activity. As one of these officials stated:

> *When it comes to cooperation with other local governments, in general, this* [was] *forbidden. (…) The most important subject for us, the relocations, is something we* [had] *no impact on. We were relocating people to Germany, Italy, Portugal or France, while we* [were] *forbidden to relocate people to the neighbouring municipalities.*

The official explained that his unit 'had been in conversation with another Polish city – as the latter could potentially host migrants relocated from Lublin – but there was no green light from the state authorities'. In practical terms, the problem had been that the interviewee's city 'could not send a coach to [the other city] and [the other city] could not send a coach to [them]'. As a result, the authorities could only informally encourage the newcomers to relocate for themselves, through the use of public transport. On top of that, there were, of course, cases of relocation of displaced persons abroad, co-organised by local authorities and their foreign counterparts. The examples include: Cracow (Kraków.pl 2022) and Nowy Sącz (nowysacz.naszemiasto.pl 2022).

Finance as a driver or a barrier for local governments' involvement

Another issue touched upon in this analysis is local governments' finances. Indeed, the ability of local authorities' to provide support for displaced persons is tangibly curbed by their budgets. Firstly, there are constraints that the regulatory framework imposes on them when it comes to the management of their finances. Secondly, having limited resources, local authorities are obliged to deliver on many different public policies. Hence, when committing extracurricular expenditure to support forced migrants, they potentially risk failing in the delivery of their basic tasks. Indeed, facing the 2022 emergency, some local governments complained that:

> *Every municipality that hosts displaced persons, de facto decides to fail in exercising its expenditure plan regarding public services (...) due to the costs connected to the new tasks, increased workload or indirect costs* (Samorządowy Okrągły Stół 2022: 30).

On the other hand, specific changes were implemented to the legal framework and additional funding was provided to local authorities. Such developments enabled the involvement of local governments, which also accessed alternative sources of income, thus increasing their capacity to fund support for forced migrants. In this context, it is worth mentioning that, according to the OECD, the condition for effective decentralisation is a subnational fiscal autonomy, as 'subnational governments need own-source revenues beyond grants and shared tax revenues – and they need to develop other sources of revenue to have a balanced basket of revenues' (2019: 12).

Turning, now, to examples illustrating the above changes, the act of 12 March formally allowed local governments to commit public funding to finance the support that they now had to deliver. The new tasks were transferred to local governments in the form of 'commissioned tasks [shifted from] the central government's remit'. This indicated that there should be adequate financing provided to local authorities to cover their new responsibilities. Such funding was, indeed, delivered through the fund established in one of the state-owned banks (Art. 14). To allow local governments to commit resources to aid the newcomers, the special Act allowed them to suspend some of their operations (Art. 112), adjust their annual budgets and multi-annual financial prognoses (Art. 111) and repurpose the funding from certain sources (Art. 31 a–b, 34, 36). It also allowed for derogations from the Polish *Public Procurement Law* and from the *Law on Public Finances*. Finally, some of the regulatory limitations on the scope of central government's contribution to local governments' and non-public institutions' expenses were repealed.

The State Council of the Regional Accounting Chambers (*Krajowa Rada Regionalnych Izb Obrachunkowych*), which audits and controls Polish local governments' financial management, issued a direct communication whereby local governments were additionally reassured about the loosening of the financial restrictions on their expenditure (*Krajowa Rada Regionalnych Izb Obrachunkowych* 2022a, 2022b). Such a step was an important enabler of local authorities' involvement, given that both previous research (e.g. Smith 2000 on British local governments) and the communication from Polish local governments (Samorządowy Okrągły Stół 2022: 32) suggested that the lack of a clear regulatory pathway to increased engagement might result in concerns among local governments that they would see their expenditure questioned by the relevant controlling bodies.

While the above changes empowered local governments to get involved, the cited act was introduced only as a mitigation measure, following the outbreak of the emergency. In the first days after the Russian full-scale invasion of Ukraine began, Polish local governments could not formally finance their new, intended involvement. As a temporary measure, they were, therefore, given an informal acquiescence by regional representatives of the central government ('a gentlemen's agreement with the *voivode*', as one interviewee described it). They were also promised that the incurred expenses would be reimbursed by the state authorities after the relevant regulations were introduced. Some of my interviewees highlighted that local governments' financial discretion is often based on an informal top-down consent granted by central government in an *ad-hoc* manner, under given circumstances (in the past, for example, during the Covid-19 pandemic). Similarly, the scope of local governments' discretion in the development and implementation of policies supporting forcibly displaced persons is also, to a great extent, dependent on the in-hand agenda mandated by central government. Additionally, during the 2022 emergency, the funding was received too late and – as of 2022, when this analysis was carried out – many local governments received reimbursement for only some of their additional expenses. For example, due to such financial challenges, Lublin – a city of approximately 350,000 which hosted around 70,000 forced migrants as of August 2022 – found it necessary to cancel the multi-million construction of the municipal authorities' new office building.

To cope with such issues, local governments first accessed and benefitted from non-state funding. For instance, EU member states were allowed to deploy Cohesion Funds and FEAD to support the displaced

persons during the 2022 humanitarian emergency (Council of the European Union 2022b). In Lubelskie, the European Social Fund was deployed in response to the discussed events (ROPS Lublin 2022), while other examples included the Interreg (EU Cohesion Policy-funded instrument for interregional cooperation in the EU) and funding from the Polish–German Youth Cooperation (Stowarzyszenie Gmin Polskich Euroregionu Pomerania 2022). On top of that, the support received from major humanitarian support agencies such as the UNHCR or UNICEF co-financed the emergency-related tasks of local authorities – for instance, in Cracow.

Another vital source of financial support for local governments was direct and indirect contributions from Polish civil society. In practical terms, individuals, organisations and businesses covered much of the costs connected to the provision of support to newcomers across the country. Alongside making direct financial donations, individual people across the country had funded or directly provided alimentation, healthcare or housing for newcomers and thus took on much of the costs that would otherwise have had to be covered by public authorities. The scale of such a contribution was significant enough for one of the interviewees to describe the wider Polish society or local governments as temporary 'main sponsors' in the context of this humanitarian emergency.

Communication between local authorities, local residents and the central government

Another factor that impacted on local governments' involvement in the analysed policy system was the relationships formed between local authorities and, firstly, residents in the local governments' respective areas and, secondly, the state government. This article addresses such relationships, acknowledging the importance of considering: 'forms of interaction that exist between different policy levels (vertical modes of interaction)' and extending beyond 'different cities and countries (horizontal modes of interaction)', in order to avoid insulating local policy-making from the broader context of democratic and institutional systems (Dekker, Emilsson, Krieger and Scholten 2015: 653).

During the Ukraine emergency, the changes to the policy system were mediated by local governments deploying soft power through communicative actions and, hence, contributing to a redefinition of inter-institutional power relations. This included the public negotiation of local governments' systemic position and their prerogatives – and lobbying in favour of, or against, certain policy solutions. Public communication by some local governments in that period were of a coercive nature, clearly aimed at imposing certain structural changes. At the same time, the examples of more-frequent inter-institutional exchanges between different levels of public governance resonate with the OECD's suggestion that the decentralisation of public management can be mediated by a change in the nature of the relationship between different levels of government towards cooperation and communication (OECD 2019: 155).

Indeed, the communication between local governments and the central government intensified in the analysed period, particularly regarding the frequency of exchanges between regional representatives of the central government and local authorities. This allowed those institutions to cover every-day crisis management on a local scale. Moreover, some institutional changes were introduced through the establishment of new units in the Joint Commission of the Local Governments and the Central Government (*Komisja Wspólna Rządu i Samorządu Terytorialnego*) under the Polish Ministry of the Interior. The aim of these changes was to facilitate the development of the legislative framework relevant to the crisis – a development which was, indeed, ongoing at the time (Portalsamorzadowy.pl 2022).

These changes provided local governments with the opportunity to deploy lobbying activities aimed at the achievement of the desired changes to the regulatory framework. In this respect, representatives of local authorities submitted memoranda to the central government's representatives which listed the expected legislative changes. Allegedly, few such proposals resulted in the expected changes being actually

implemented. The explicit postulates of legislative changes were also articulated by local governments during the Polish Local Governments' Round-Table, a series of discussions initiated by Polish local governments in May 2022, bringing together key Polish public-policy stakeholders (Samorządowy Okrągły Stół 2022).

Secondly, turning to local government associations, the role of such bodies was pronounced particularly in large cities, where a cooperation of local stakeholders tends to be of a more political nature. Local government associations provided a platform for the articulation of the ambitions of some local leaders. Indeed, many such leaders perceived their own role during the Ukraine emergency as greater than stipulated in the relevant legal framework. As a result, they spoke of the expectation that they would be assigned greater responsibility in the management of Polish policy addressing forced migrants. The new circumstances provided local authorities with arguments supporting their desired changes to the inter-institutional power balance within the cited policy system.

Indeed, already before the crisis of 2022, associations of local governments had been vocal about the need to build the Polish *Willkommenskultur* on a municipal level, insisting on the development of support structures for asylum-seekers (Union of Polish Metropolises 2020, 2021). This materialised, for instance, in the signing of the 'Declaration on Cooperation (...) in the Area of Migration' (Union of Polish Metropolises 2017) by some large cities in Poland. After the Russian Federation invaded Ukraine in 2022, such associations publicly reasserted their position as stakeholders engaged in public-policy development, emphasising their 'social and ethical responsibility stemming from [their] new role of the hosts taking in persons in a difficult situation (...)' (Union of Polish Metropolises 2022: 12), portraying themselves as 'bearing almost all the weight of responsibility' for hosting the forced migrants from Ukraine and thus 'facing the challenge of developing the new social and institutional solutions' (2022: 5; on education for the Ukrainian children: the Association of Polish Cities 2022). In their narrative they stressed that the central government did not perform well in responding to the humanitarian emergency and that its alleged failure to develop an effective state system in previous years had forced local governments in 2022 to address the new challenges in their own right (Yes! Local Governments' Movement for Poland 2022: 4, 9).

Some local authorities in large cities actively operated in the mainstream public discourse, stressing in their communications that they are best placed to take over the responsibility for both the implementation and the development of policy addressing displaced persons. Such a narrative included an appeal to establish a 'comprehensive and well-organised' system of forced migrants' reception, to replace 'the spontaneous and disorganised actions' of the central government (2022: 2). Such a system, it was suggested explicitly, should be developed by local governments, with the central government acting in a supporting capacity (Union of Polish Metropolises 2022: 13). In this context, informal conversations were held, during the meeting of one local-government association, between local leaders, who addressed the possibility of proposing a bottom-up project of the new state-policy framework that would cover both voluntary and non-voluntary migrants.

The above activities exemplify the pattern whereby the relative mobilisation of stakeholders previously less engaged in a given public policy leads to an increased likelihood of policy changes. Such a causal relationship was highlighted, for example, by Ongaro (2020) or, in an MLG context, by Benz and Broschek (2021). The latter noted that:

> *Policies and power relations provide reasons for designing or reforming institutions but both are also sources of change that affect institutions,* [as] *in processes of policy-making, actors modify their patterns of interaction, reinterpret rules and engage in contests over power and resources. In MLG, they not only exploit the room to manoeuvre in the different arenas of policy-making within, between and beyond governments but also follow functional requirements to shift powers between jurisdictions* (2021: 263).

Another type of relationship maintained by local authorities in a democratic context is with local residents. Polish local governments both rule and are ruled, as part of a representative democratic system. In this context, public furtherance for Ukrainian persons in Poland was strong and almost unanimous. The above, together with increased media attention, facilitated the engagement of some local political leaders in the provision of support. Many local politicians were encouraged to directly engage with their communities. Such engagement took the form of either their participation in the deployment of substantive humanitarian aid on a local scale or appeals to residents of their respective constituencies to provide shelter and aid to newcomers.

Cooperation within institutional networks and an experience derived from a previous involvement in policy-making

Another type of issue that impacted on local governments' situation under the analysed circumstances were the implications of participation in horizontal networks. The (semi-)formalised structures facilitating cooperation between local-level stakeholders, the practices they had jointly developed and informal relationships built over the years of path-shaping around migration policy (on path-shaping see, e.g., Torfing 1999), allowed for the rapid provision of support to displaced persons. During the Ukraine emergency such structures, particularly in big cities, were upscaled, mobilised and, consequently, reinforced. This allowed for the immediate deployment of support, long before the state-coordinated, institutionalised solutions could be introduced by the central government (Polish Ombudsman's Office 2022). As a result, the bulk of the responsibility was shifted to local stakeholders at the very outset of the emergency. The cited developments, inherently connected to the mobilisation and development of local governments' networks, generated social and institutional capital on a local level and can be expected to impact on the power balance in the overall policy system.

Particularly since the 2015 so-called refugee crisis, local authorities in some large Polish cities have cooperated hands-on with civil society to establish local migration policies and accompanying institutional structures. Such efforts were necessitated by the inertia of the state authorities and the increasing presence and visibility of foreigners in Polish metropolises. The circumstances around the Russian full-scale aggression against Ukraine and the inflow of migrants boosted the development of local migration policies in Poland. For instance, Cracow's municipalities, in the interview held for this study, suggested that the issues connected to foreigners' long-term integration would be accentuated in the updating of the city's strategic policy documents. Indeed, Cracow's multicultural policy: 'The Open Cracow' ('*Otwarty Kraków*') was then evaluated in 2023, with a view to re-profile it to respond to the new, forced-migration-related challenges.

The social capital that enabled the involvement of some stakeholders had already been developed in Poland before 2022 – for instance, in the context of the humanitarian crisis on the Polish-Belarusian border (in this specific case, though, mostly among NGOs and other civil society stakeholders). In the context of the 2022 humanitarian emergency, the representative of the local government in Lublin explained that: 'A majority among [the persons engaged in provision of aid to displaced persons in the city], moments before this conflict, in Lublin, had been supporting another group of forced migrants, under the framework of *Grupa Granica*'.[5]

Indeed, the Social Committee for Aiding Ukraine (*Centrum Kultury w Lublinie* 2022) in Lublin (a collaboration between local NGOs and the municipal government) had been in operation since early 2022, both when the crisis was unfolding on the Belarussian border and in the context of the Russian aggression against Ukraine. As argued by the interviewee from Lublin's local government, 'The people who met 5 hours after the first bombs had been dropped, they knew each other. They knew (how to collectively organise support)', having taken part in the 15-year-long development of the city's migration policies. This capital facilitated a coordinated engagement of several thousand volunteers in Lublin in the first week of the war, including 460 individuals who spoke Ukrainian. At the same time, according to the interviewee, the human resources deployed by the

office of the central government's regional representative totalled 6 people deployed across 3 different areas of the city, who also lacked sufficient foreign-language skills.

Importantly, the Committee operated on a largely informal basis during both crises. According to the interviewee, the Committee 'did not have a legal status, nor its own bank account, had not been established with a legal act and, in such a form, it co-managed the city, handling dozens of millions of Polish *zloty*'. Such co-management was carried out based on the informal understanding shared between different institutions – 'Sometimes a city representative might say: "I understand that your NGO might undertake certain steps", to which the NGO would respond: "We also assume that the city would set up portable toilets in a certain spot"'. At the same time, the interviewee clarified that 'the committee had its own decisive body-making decisions on a consensus basis, without ever holding ballots, and (…) it was catching up once a week (as of summer 2022) and, as such, it was not an entirely informal initiative'. The interviewee concluded that 'This was the way that (policy stakeholders in Lublin) solve problems: (…) based on the built trust (...), with the diverse organisations sitting next to each other, benefitting from the local residents' "goodwill and support"'.

Some Polish local governments acted additionally as coordinators and intermediaries in the process of transferring of material support from abroad to Poland and then from Poland to Ukraine. Western-European local authorities sent humanitarian aid through their partner cities and villages across Poland, supporting both Ukrainians in Poland and those who had remained in Ukraine (see, for instance, Piła.pl 2022; Wydminy.pl 2022; Żagań.pl 2022). Similar efforts were also commonly undertaken by Polish local governments. One of the interviewed representatives of a medium-sized town in Southern Poland argued that their unit had been informally dispatching lorries directly to Ukraine, instead of relying on the central government's logistic channels, doubting the state government's ability to act efficiently under such urgent circumstances.

Another municipality's representative explained that:

> [his city] *and its Western-European partners dispatched more than one hundred lorries to* [his city's] *Ukrainian partner cities, with the first of such transport, from Switzerland, having crossed the Ukrainian border on the fourth day of the conflict (...), weeks before the coordination of humanitarian corridors in the South came into being.*

The interviewee mentioned that 'all those lorries were being dispatched illegally', as the interviewee and their counterparts from other units across Poland had been forbidden by state authorities to engage in such an activity. Instead, they had been commanded to transfer the material aid to the voivode's warehouses, as only the freight handed over therein could be exempt from customs procedures. While it is not an objective of this article to assess the extent to which such a strategy could outperform the effectiveness of adhering to the central government's requests, the above examples illustrate that some local governments in Poland preferred to rely on their horizontal networks, rather than to co-operate with the central government. The existing horizontal networks were actively used for this purpose.

As far as the involvement of local-government associations is concerned, apart from activities supporting the coordination of local-government activities, I also identified some examples of associations that took on the role of facilitators of international cooperation, putting Polish and foreign stakeholders involved in a provision of support in touch with each other. For example, the Association of Polish Municipalities of the Pomerania Euroregion (*Stowarzyszenie Gmin Polskich Euroregionu Pomerania*), according to its interviewed representative, utilised its networks developed during the implementation of transnational programmes and acted as 'an intermediary' in communication between German NGOs and local authorities and stakeholders in Poland. This was indeed possible because the German partners of the association were perceived as long-time friends and were described as such in the interview. Cooperation such as that cited exemplify a reinforcement

of contacts between local government units. Such a change during the Ukraine crisis led to a better institutional coordination and improved information exchange, contributing to local authorities' capacity to act.

When discussing local governments' horizontal networks, one important caveat to be made is that some of the NGO-sector representatives argued that their sector's role in mitigating the emergency was underappreciated in public discourse *vis-à-vis* the role of local authorities. The NGO coordinator's response, in our interview in one of the largest Polish cities, pointed out that the *ad-hoc* involvement of Polish civil society suffered from a lack of sufficient resources and of previous subject-specific experience and knowledge. The reason for this was that, in the past, there had been hardly any opportunities in Poland to develop such know-how. While NGOs provided additional resources that strengthened the overall capacity of the public-policy system, in most cases, their involvement relied on private residents' time and effort, rather than on an implementation of sustainable strategies devised in advance. The above circumstances, according to the cited interviewee, in some instances resulted in NGOs becoming overburdened with responsibility, while local authorities significantly relied on their civil-society partners' support to cope with the circumstances. Rather than the poor management by the involved civil-society organisations, such a dynamic highlights the general reliance of the emergency response on private people's good will. This, in turn, points to the insufficiency of the available assets on all levels of governance and to the lack of a sustainable contingency framework in order to respond to such a large-scale humanitarian challenge as the events of 2022.

Discussion

In terms of the long-term implications of the developments discussed in this article, we should examine the extent to which such changes might have sustained impacts on the broader policy system and whether they can lead to a permanent policy change.

On the one hand, local governments' new involvement could be seen as mostly situational – an *ad-hoc* mitigation measure, rather than an indication of a long-term, extended commitment. Indeed, local governments stepped in because they were best positioned to respond to the inflow of migrants locally. To some extent, they were also forced to address the gaps in the system of immediate support for forced migrants. While the state authorities financially and legislatively empowered local governments to increase their involvement, such circumstances were created only temporarily and, as the changes in this area had a limited scope, they allowed local governments mostly to implement *ad-hoc* activities. In the long term, local authorities' formal prerogatives around forced migration in Poland remain limited and, formally, their impact on asylum and refugee policy is not significant. Moreover, from a political point of view, the interviewees unanimously agreed that, under the former government of the Law and Justice Party, a long-standing, substantive shift towards decentralisation seemed highly unlikely, as the party had pushed for a recentralisation of the overall public-governance system. This, generally, resulted in a deterioration of the state authorities' relationship with local-government communities.

On the other hand, local governments' mobilisation around the humanitarian emergency allowed some local authorities to accumulate institutional capital. This, in the future, could empower them to impact on the policy landscape. One can argue that the existing policy structures have been challenged and destabilised by the external circumstances and that a window of opportunity has opened for local governments to negotiate the power relations set in the policy system. The existing policy path was dislocated or, at least, temporarily destabilised, while bottom-level stakeholders, particularly local authorities in large cities, engaged in path-shaping around policies addressing displaced persons. The fact that some local governments seem to have identified a critical juncture in the analysed emergency illustrates that the circumstances around specific crises tend to be perceived differently by the various policy stakeholders. In this context, Torfing (2001: 289) pointed out that such

challenges might be seen, either as ‘a failure, a crisis, or a new opportunity (…)’, depending on a given stakeholder’s point of view.

Firstly, local authorities developed and reinforced institutional cooperation – both in the country and internationally – and reinforced their relationship with a broader civil society across the country. On a political level, some local leaders and their units were promoted and strengthened, having been commissioned to deliver a wider range of tasks, assume a greater scope of responsibility and enjoy greater managerial leeway. In general, local governments gained an opportunity to discursively reassert their own significance within the Polish public-governance system. They saw their political leverage extended and their impact on the Polish public discourse increasing. The emergency also created a space in which local authorities could highlight and negotiate specific regulatory issues in which they were interested (such as an overall insufficiency of local government revenues) in a direct communication with central authorities.

Moreover, the crisis provided the stimulus to update and further develop local migration policies, particularly in large cities. The updates were considered necessary to ensure that such policies could successfully address forced migrants’ specific needs and their increased presence in Poland. The external circumstances since 2022 allowed local governments to develop an experience in crisis management and in the deployment of humanitarian aid. There was an opportunity to gain such a hands-on experience under legal and financial constraints, with limited resources and under time pressure. On top of that, currently, the increased number of forced migrants residing in Poland provides an opportunity for local governments to develop an in-house, practical experience in the socio-economic integration of foreigners with forced-migration experience and in the provision of public services to them.

It is likely that some new institutional arrangements – the adjustments to the system of delivery of public services to foreigners, the reinforced network structures and, most importantly, the increased engagement and sense of responsibility of some local authorities – will be retained in the coming years. In this sense, the changes described might, in the long term, impact on the situation of migrants belonging to other groups than only the beneficiaries o the Temporary Protection Directive 2001/55/EC – such as asylum-seekers, refugees, and other groups of migrants characterised by greater vulnerability and, hence, requiring more extensve institutional support. The accumulated capital might also, in the long term, foster political ambitions, improve local governments’ bargaining position and stimulate their participation in discussions crucial to the development of the migration policy system in Poland. This includes both the development of policies addressing voluntary and involuntary migrants and the conversations regarding the very shape of the public governance system, under the framework of the Polish polity.

Conclusions

Turning now to the conclusions from the study, in this paper I analysed the process of policy change, based on the examination of various forms of local governments’ increased engagement in the policy system covering forced migrants in Poland. In late February 2022, after Russia invaded the whole territory of Ukraine, Poland saw a significant influx of Ukrainian forced migrants, which provoked a humanitarian emergency. In the light of such a challenge, the legal, budgetary and institutional arrangements of the system of policies addressing forced migrants proved insufficient to cope. Following the state government’s decision, the external circumstances for local governments’ activity changed significantly in areas such as law or finance. At the same time, a broader societal context for local governments’ activity shifted. Following such developments, local governments mobilised their own resources in order to respond to the new challenge all across the country.

Local authorities, both formally and informally, assumed a range of new responsibilities. Arguably, their involvement also surpassed what was explicitly commissioned to them based on the Special Act of 12 March 2022. While some activities were already pursued prior to February 2022, the new circumstances prompted local governments to increase their collective involvement – and this happened across an extended range of sub-areas of public policy. For large cities, the key resource that allowed for that was the capital generated in local-level migration policy-making in cooperation with civil society in the years before the 2022 full-scale invasion. During the crisis, the existing policy structures were upscaled and mobilised. Local governments, supported by NGOs and civil society, in many cases deployed humanitarian support in their own right, largely at their own cost and risk and facing financial and administrative challenges connected to such an involvement.

Following the above developments, the pattern of power relations within the policy system shifted. As a result, the crisis circumstances prompted a temporary redefinition of local governments' structural position *vis-à-vis* other policy stakeholders, within a broader policy system. In a *de facto* hierarchical set-up of the Polish local governance system, local governments' position was strengthened, as they gained more leverage in their ongoing relationship with the central government, while their ties with civil-society stakeholders became, strategically, closer and stronger. At the same time, local governments' functional role in the discussed policy system changed, as they temporarily became the key stakeholders in the implementation of activities addressed at helping forced migrants in Poland. The changes described in this article and the activities deployed by local governments in relation to such developments, increased local authorities' importance regarding the further development of the discussed policy system. While local governments in Poland tended to be largely excluded from this process in the past, during the Ukraine emergency, they increased their presence in the shaping process of the policy system.

Analysing how the above changes occurred, the article has highlighted an interplay between the regulatory and institutional structures of the unitary state and the local governments' activities that undermined the inter-institutional hierarchies within the forced-migration policy system. Through various activities, local governments either directly pushed for policy changes or at least indirectly impacted on policy-making processes, contributing to the development of the broader system. The examples of such an involvement included the deployment of communication activities in a public discourse, lobbying, the building of capacity based on the mobilisation of inter-institutional networks, increased engagement in the implementation of state policies, upscaling and the development of local migration policies, as well as local governments' involvement in a wide range of *ad-hoc* humanitarian initiatives.

Notes

1. Implementing the Council's Implementing Decision (EU) 2022/382of 4 March 2022 Establishing the Existence of a Mass Influx of Displaced Persons from Ukraine within the Meaning of Article 5 of Directive 2001/55/EC and Having the Effect of Introducing Temporary Protection (Council of the European Union 2022a) which, in turn, activated the provisions of the Council Directive 2001/55/EC of 20 July 2001 on minimum standards for giving temporary protection in the event of a mass influx of displaced persons (…) (Council of the European Union 2001).
2. Notably, the target group of the regulation was Ukrainian citizens and their families; however, beneficiaries of the TPD 2001/55/EC holding passports of other countries could legalise their residence based on the Directive.
3. Council Directive 2001/55/EC of 20 July 2001 on Minimum Standards for Giving Temporary Protection in the Event of a Mass Influx of Displaced Persons and on Measures Promoting a Balance of Efforts Between Member States in Receiving such Persons and Bearing the Consequences Thereof.

4. Described in the interview (in Polish) as '*asystenci nieromscy*'.
5. *Grupa Granica* ('The Border' Group) is the Polish social movement formed as a result of the widespread discontent with the reaction of the Polish central government to the events unfolding on the border between Poland and Belarus and the humanitarian crisis that resulted.

Funding

The study was not supported by external funding.

Conflict of interest statement

No conflict of interest was reported by the author.

ORCID ID

Wiktor Magdziarz https://orcid.org/0000-0003-2575-6595

References

Act of 8 March 1990 on Municipal Government (Journal of Laws of 1990, No. 16, item 95, as amended, including amendments introduced on 12 March 2022). https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU19900160095/U/D19900095Lj.pdf (accessed 9 July 2022).

Act of 5 June 1998 on County Government (Journal of Laws of 1998, No. 91, item 578, as amended, including amendments introduced on 12 March 2022). https://isap.sejm.gov.pl/isap.nsf/DocDetails.xsp?id=WDU19980910578 (accessed 8 October 2022).

Act of 5 June 1998 on Regional Government (Journal of Laws of 1998, No. 91, item 576, as amended, including amendments introduced on 12 March 2022). https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU19980910576/U/D19980576Lj.pdf (accessed 8 October 2022).

The Act of 13 June 2003 on Provision of Protection to Foreigners on the Territory of the Republic of Poland (Journal of Laws of 2003, No. 128, item 1176, as amended). https://isap.sejm.gov.pl/isap.nsf/DocDetails.xsp?id=WDU20031281176 (accessed 8 October 2022).

Act of 12 March 2004 on Social Assistance (Journal of Laws of 2004, No. 64, item 593, as amended). https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDU20040640593/U/D20040593Lj.pdf (accessed 8 October 2022).

Act of 12 December 2013 on Foreigners (Journal of Laws of 2013, item 1650, as amended). https://isap.sejm.gov.pl/isap.nsf/DocDetails.xsp?id=wdu20130001650, (accessed 8 October 2022).

Act of 12 March 2022 on Support for the Nationals of Ukraine in Response to the Armed Conflict in the Territory of That State (Journal of Laws of 2022, item 583, as amended). https://isap.sejm.gov.pl/isap.nsf/DocDetails.xsp?id=WDU20220000583 (accessed 8 October 2022).

Association of Polish Cities (2022). *Apel Związku Miast Polskich w Sprawie Edukacji i Wsparcia Dzieci Uchodźców Wojennych z Ukrainy*. https://www.miasta.pl/aktualnosci/apel-zwiazku-miast-polskich-w-sprawie-edukacji-i-wsparcia-dzieci-uchodzcow-wojennych-z-ukrainy (accessed 14 July 2022).

Bache I., Flinders M. (2004). Themes and Issues in Multi-Level Governance, in: I. Bache, M. Flinders (eds), *Multi-Level Governance*, pp. 1–11. Oxford: Oxford University Press.

Benz A. (2019). Transformation of the State and Multilevel Governance, in: N. Behnke, J. Broschek, J. Sonnicksen (eds), *Configurations, Dynamics and Mechanisms of Multilevel Governance*, pp. 23–40. Cham: Palgrave Macmillan.

Benz A., Broschek J. (2021). Designing, Reforming or Adapting? Multilevel Governance and Institutional Change, in: A. Benz, J. Broschek, M. Ledered (eds), *A Research Agenda for Multilevel Governance*, pp. 261–277. Cheltenham: Edward Elgar.

Börzel T. (2021). Regional and Global Multilevel Governance Between and Beyond States, in: A. Benz, J. Broschek, M. Ledered (eds), *A Research Agenda for Multilevel Governance*, pp. 117–134. Cheltenham: Edward Elgar.

Buraczyński R. (2015). Sekurytyzacja Polskiej Polityki Migracyjnej a Sytuacja Przygranicznych Regionów Polski Wschodniej. *Studia Migracyjne – Przegląd Polonijny* 41(1): 85–110.

Caponio T. (2021). Governing Migration through Multi-Level Governance? City Networks in Europe and the United States. *Journal of Common Market Studies* 59(6): 1590–1606.

Caponio T., Jones-Correa M. (2018). Theorising Migration Policy in Multilevel States: The Multilevel Governance Perspective. *Journal of Ethnic and Migration Studies* 44(12): 1995–2010.

Centrum Kultury w Lublinie (2022). *Wspieramy Lubelski Społeczny Komitet Pomocy Ukrainie*. http://ck.lublin.pl/2022/02/standwithukraine/ (accessed 14 July 2022).

Cichocka E., Homel K., Krzyworzeka-Jelinowska A., Łukasiewicz K., Nowosielski M., Pachocka M., Podgórska K., Popławska J.Z., Winiarska A., Wach D. (2022). Przewodnik Tworzenia Polityk Włączających Osoby z Doświadczeniem Migracji w Życie Miast. *CMR Spotlight* 12(46). Centre of Migration Research, University of Warsaw. https://www.migracje.uw.edu.pl/wp-content/uploads/2022/12/Spotlight-DECEMBER-2022.pdf (accessed 23 June 2024).

Council of the European Union (2001). *Council Directive 2001/55/EC of 20 July 2001 on Minimum Standards for Giving Temporary Protection in the Event of a Mass Influx of Displaced Persons and on Measures Promoting a Balance of Efforts between Member States in Receiving such Persons and Bearing the Consequences Thereof* (Official Journal L 212, 07/08/2001 P. 0012 – 0023). https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex:32001L0055 (accessed 22 June 2024).

Council of the European Union (2022a). *Council's Implementing Decision (EU) 2022/382 of 4 March 2022 Establishing the Existence of a Mass Influx of Displaced Persons from Ukraine within the Meaning of Article 5 of Directive 2001/55/EC and Having the Effect of Introducing Temporary Protection* (Official Journal of the European Union L 71/1). https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32022D0382 (accessed 22 June 2024).

Council of the European Union (2022b). *Ukraine: €17 Billion of EU Funds to Help Refugees*. https://www.consilium.europa.eu/en/press/press-releases/2022/04/04/ukraine-council-unlocks-17-billion-of-eu-funds-to-help-refugees/ (accessed 21 July 2022).

Dekker R., Emilsson H., Krieger B., Scholten P. (2015). A Local Dimension of Integration Policies? A Comparative Study of Berlin, Malmö and Rotterdam. *International Migration Review* 49(3): 633–658.

Duszczyk M., Kaczmarczyk P. (2022). The War in Ukraine and Migration to Poland: Outlook and Challenges. *Intereconomics* 57(3): 164–170.

Filomeno F.A. (2017). *Theories of Local Migration Policy*. Cham: Palgrave Macmillan.

Izdebski H., Kulesza M. (1999). *Administracja Publiczna. Zagadnienia Ogólne. Wydanie 2.* Warsaw: Liber.

Jaworski B. (2020). Pozycja Ustrojowoprawna Samorządu Gminnego w Systemie Administracji Publicznej. *Studia Iuridica* 85: 140–156.

Klaus W., Lévay M., Rzeplińska I., Scheinost M. (2018). Refugees and Asylum Seekers in Central European Countries: Reality, Politics and the Creation of Fear in Societies, in: H. Kury, S. Redo (eds), *Refugees and*

Migrants in Law and Policy, Challenges and Opportunities for Global Civic Education, pp. 457–495. Cham: Springer.

Korczak J. (2020). Władztwo Terytorialne Gminy. Od Idei do Mitu. *Ruch Prawniczy, Ekonomiczny i Socjologiczny* 82(4): 97–111.

Kotarba B. (2016). Znaczenie Kontekstu Sytuacyjnego w Lokalnej Polityce Publicznej. *Wrocławskie Studia Politologiczne* 21: 119–130.

Krajowa Rada Regionalnych Izb Obrachunkowych (2022a). *Komunikat KR RIO o Ujmowaniu w Budżecie Środków z Funduszu Pomocowego na Podstawie Ustawy z Dnia 12 Marca 2022 r. o Pomocy Obywatelom Ukrainy w Związku z Konfliktem Zbrojnym na Terytorium tego Państwa.* https://rio.gov.pl/139/komunikat-kr-rio-o-ujmowaniu-w-budzecie-srodkow-z-funduszu-pomocowego-na-podstawie-ustawy-z-dnia-12-marca-2022-r-o-pomocy-obywatelom-ukrainy-w-zwiazku-z-konfliktem-zbrojnym-na-terytorium-tego-panstwa.html (accessed 16 July 2022).

Krajowa Rada Regionalnych Izb Obrachunkowych (2022b). *Rozdysponowanie przez Samorządy Środków Pochodzących z Rezerwy na Zarządzanie Kryzysowe na Wydatki Związane z Kryzysem Uchodźczym*. https://rio.gov.pl/137/rozdysponowanie-przez-samorzady-srodkow-pochodzacych-z-rezerwy-na-zarzadzanie-kryzysowe-na-wydatki-zwiazane-z-kryzysem-uchodzczym.html (accessed 16 July 2022).

Kraków.pl (2022). *Orlean Ugości 140 Uchodźców z Ukrainy!* https://www.krakow.pl/aktualnosci/258317,29,komunikat,orlean_ugosci_140_uchodzcow_z_ukrainy_____140_____.html (accessed 22 June 2024).

Lowndes V., Leach S. (2004). Understanding Local Political Leadership: Constitutions, Contexts and Capabilities. *Local Government Studies* 30(4): 557–575.

Małecka-Łyszczek M. (2013). The Concept and Divisions of Public Assignments with a Particular Focus on the Functions of Local Government. *Zeszyty Naukowe Uniwersytetu Ekonomicznego w Krakowie* 921: 55–69.

Matusz-Protasiewicz P., Kwieciński L. (2018). Kształtowanie Lokalnych Polityk Integracji Imigrantów – Działania Władz Gdańska i Wrocławia. *Problemy Polityki Społecznej. Studia i Dyskusje* 43(4): 125–142.

Nowysacz.naszemiasto.pl (2022). *Nowy Sącz. Czy Miasta Partnerskie Przyjmą Część Uchodźców Przebywających w Stolicy Sądecczyzny?* https://nowysacz.naszemiasto.pl/nowy-sacz-czy-miasta-partnerskie-przyjma-czesc-uchodzcow/ar/c1-8737523 (accessed 21 July 2022).

OECD (2019). *Making Decentralisation Work. A Handbook for Policy-Makers.* Paris: OECD Publishing.

Ongaro E. (2020). Multi-Level Governance and Public Administration. *Oxford Research Encyclopedia of Politics*. https://oro.open.ac.uk/69415/1/Ongaro_Multi-Level%20Governance%20and%20Public%20Administration_PA_FINAL%20clean.pdf (accessed 21 May 2023).

Piattoni S. (2010). *The Theory of Multi-Level Governance. Conceptual, Empirical, and Normative Challenges.* Oxford: Oxford University Press.

Piła.pl (2022). *Imola Wspiera Ukrainę*. https://www.pila.pl/aktualnosci/imola-wspiera-ukraine.html (accessed 21 July 2022).

Polish Constitution of 2 April 1997 (Journal of Laws of 1997, No. 78, item 483, as amended). https://www.sejm.gov.pl/prawo/konst/polski/kon1.htm (accessed 8 October 2022).

Polish Ombudsman's Office (2022). *Pomoc UE na Rzecz Uchodźców z Ukrainy – Także dla Organizacji Pozarządowych. MFiPR: Doceniamy NGOS-y*. https://bip.brpo.gov.pl/pl/content/rpo-ue-pomoc-uchodzcy-ukraina-ngosy (accessed 21 July 2022).

Portalsamorzadowy.pl (2022). *Powołano Zespół ds. Uchodźców z Ukrainy*. https://www.portalsamorzadowy.pl/polityka-i-spoleczenstwo/powolano-zespol-ds-uchodzcow-z-ukrainy,372621.html (accessed 22 July 2022).

Rondinelli D. (1999). What is Decentralization?, in: J. Litvack, J. Seddon (eds), *Decentralization Briefing Notes*, pp. 2–5. Washington, D.C.: World Bank Institute.

ROPS Lublin (2022). *Projekt pt. 'Lubelskie Pomaga Ukrainie'*. https://rops.lubelskie.pl/projekt-pt-lubelskie-pomaga-ukrainie/ (accessed 21 July 2022).

Samorządowy Okrągły Stół (2022). *Biała Księga. Wyzwania Systemowego Wsparcia Uchodźców na Poziomie Lokalnym i Krajowym, Wrocław, 8–9 May 2022*. https://ofop.eu/wp-content/uploads/2022/05/Okragly_stol_Biala-ksiega_220530.pdf (accessed 23 June 2022).

Schmitter P.C. (2004). Neo-Functionalism, in: A. Wiener, T. Diez (eds), *European Integration Theory*, pp. 45–74. Oxford: Oxford University Press.

Sekuła A. (2016). Gmina w Systemie Zarządzania Państwem, in: A. Sekuła (ed.), *Meandry Zarządzania*, pp. 57–80. Gdańsk: Wydawnictwo Politechniki Gdańskiej.

Smith B. (2000). The Concept of an 'Enabling' Local Authority. *Environment and Planning C: Government and Policy* 18*:* 79–94.

Stowarzyszenie Gmin Polskich Euroregionu Pomerania (2022). *Solidarni z Ukrainą – Dotacje PNWM na Wsparcie Ukraińskich Partnerów*. https://www.pomerania.org.pl/event/solidarni-z-ukraina-dotacje-pnwm-na-wsparcie-/278 (accessed 12 July 2022).

Swianiewicz P. (2014). An Empirical Typology of Local Government Systems in Eastern Europe. *Local Government Studies* 40(2): 292–311.

Swianiewicz P. (2019). Zmiany w Poziomie Autonomii Samorządów Gminnych w Europie Środkowej i Wschodniej po 1990 Roku. *Studia Politologiczne* 53: 11–27.

Szonert M., Łodziński S. (2016). *'Niepolityczna Polityka'? Kształtowanie się Polityki Migracyjnej w Polsce w latach 1989–2016*. Warsaw: University of Warsaw, Centre of Migration Research, CMR Working Papers 90, 148. https://www.migracje.uw.edu.pl/wp-content/uploads/2016/06/CMR_WP_90148.pdf (accessed 19 May 2022).

Torfing J. (1999). Towards a Schumpeterian Workfare Postnational Regime: Path-Shaping and Path-Dependency in Danish Welfare State Reform. *Economy and Society* 28(3): 369–402.

Torfing J. (2001). Path-Dependent Danish Welfare Reforms: The Contribution of the New Institutionalisms to Understanding Evolutionary Change. *Scandinavian Political Studies* 24(4): 277–309.

Union of Polish Metropolises (2017). *Deklaracja Prezydentów o Współdziałaniu Miast Unii Metropolii Polskich w Dziedzinie Migracji*. http://www.regioset.pl/pdf/deklaracja_UMP.pdf (accessed 14 July 2022).

Union of Polish Metropolises (2020). *Apel UMP do Premiera w Sprawie Uchodźców z Obozu Moria*. https://metropolie.pl/artykul/apel-ump-do-premiera-w-sprawie-uchodzcow-z-obozu-moria (accessed 14 July 2022).

Union of Polish Metropolises (2021). *Stanowisko Prezydentów Miast Unii Metropolii Polskich im. Pawła Adamowicza w Sprawie Uchodźców z Afganistanu*. https://metropolie.pl/fileadmin/news/2021/08/UMP_Stanowisko_w_sprawie_uchodzcow_z_Afganistanu.pdf (accessed 14 July 2022).

Union of Polish Metropolises (2022). *Urban Hospitality: Unprecedented Growth, Challenges and Opportunities. A Report on Ukrainian Refugees in the Largest Polish Cities.* https://metropolie.pl/fileadmin/news/2022/10/UMP_raport_Ukraina_ANG_20220429_final.pdf (accessed 22 April 2024).

Wach D., Pachocka M. (2022). Polish Cities and Their Experience in Integration Activities: The Case of Warsaw. *European Affairs* 26(2): 89–105.

Wydminy.pl (2022). *Gmina Wydminy Dla Ukrainy. Wydminy dla Ukrainy, Arendsee dla Ukrainy*. https://wydminy.pl/gmina-wydminy-dla-ukrainy/2222-wydminy-dla-ukrainy-arendsee-dla-ukrainy (accessed 21 July 2022).

Yes! Local Governments' Movement for Poland (2022). *31 Dni Wojny w Ukrainie. Raport na Temat Pilnych Zmian w Organizacji Państwa Polskiego.* https://ruchtakdlapolski.pl/wp-content/uploads/2022/12/Raport-Wojna-w-Ukrainie-2.pdf (accessed 22 June 2024).

Żagań.pl (2022). *Miasto Partnerskie Teltow Włączyło się w Pomoc Humanitarną dla Ukrainy*. https://urzadmiasta.zagan.pl/2022/03/03/miasto-partnerskie-teltow-wlaczylo-sie-w-pomoc-humanitarna-dla-ukrainy/ (accessed 21 June 2022).

How to cite this article: Magdziarz W. (2024). Changes in the Involvement of Polish Local Governments in Public Policies Addressing Involuntary Migration Following the 2022 Inflow of Ukrainian Forced Migrants. *Central and Eastern European Migration Review* 13(1): 47–68.

Central and Eastern European Migration Review
Received: 17 April 2023, Accepted: 10 January 2024
Published online: 25 March 2024
Vol. 13, No. 1, 2024, pp. 69–88
doi: 10.54667/ceemr.2024.03

— ARTICLES —

Discursive Approaches to the Reception of Non-EU Migrants in Polish Official Political Discourse

Claire Laurent*, Elodie Thevenin**

Poland has faced several crisis situations related to migration in the past decade. With differences in the scale and origins of incoming people, these crises have triggered various reactions from Polish policy-makers, from the welcoming of non-EU migrants to the implementation of restrictive measures at the Polish border. The present research uses a discursive approach to study the ways in which non-EU migrants are presented and discussed in Poland. By comparing official discourses from Polish authorities during the 2015–2016 migration crisis, the 2021 border crisis with Belarus and following the Russian war on Ukraine in 2022, we analyse how different groups of non-EU migrants are discursively described and considered by political figures. Furthermore, as these crises have important links with the European Union (EU), we also investigate how Poland's relationship with the EU is envisioned by Polish authorities. Through the discourse analysis carried out, we argue that 'migrants' and 'refugees' are discursively constructed as opposing groups in a manner that is highly visible. This discursive strategy is instrumentally used to reflect on the perceived deservingness, alterity or proximity of incoming people. We identify one unifying perspective of Poland's relationship with the EU throughout these crises: Polish authorities are keen to stress the importance of its membership of the EU when benefiting from the latter's restriction of migration to Europe.

Keywords: discourse analysis, Poland, refugee, migrant, semantics, European Union

* University of Strasbourg, France. Address for correspondence: claire.laurent@unistra.fr.
** Jagiellonian University, Poland. Address for correspondence: elodie.thevenin@uj.edu.pl.

Introduction

The migration crisis of 2015–2016 greatly impacted on the European Union (EU) and contributed to the politicisation of immigration in Poland for the first time (Hutter and Kriesi 2022). Since then, migration has become a growing topic of discussion and concern in the country. The 2015–2016 migration crisis, as well as the border crisis with Belarus which began in the summer of 2021, witnessed a degrading depiction of migrants and, consequently, a fierce opposition from Polish authorities from the Law and Justice party to the migrants entering Polish territory. However, Polish reactions towards extra-EU migration have differed considerably from these perspectives since the Russian invasion of Ukraine in February 2022. Indeed, people seeking refuge in Poland from Russian aggression have been welcomed with a near-unanimous consensus by all Polish political parties.

The starkly different reactions to the various subsets of non-EU migrants underscores the tension between the terms 'refugee' and 'migrant'. According to official definitions, the former defines someone fleeing war or persecution and seeking safety in another country, while the latter refers to someone moving from one country to another without specifying the reasons behind the move (UNHCR 2015). Dictionary definitions indicate that 'migrant' is often linked to work: migrants leave their country to find better working conditions and wages, whereas refugees flee from danger (Centre National de Ressources Textuelles et Lexicales 2012a, 2012b). These terms also imply different timeframes: while 'refugee' movements seem limited to the conjunctural situation of danger, 'migrants' may settle in the host country for an unrestricted amount of time. The differences between these categories vary within social and political contexts but, often, result in the terms being used in opposition to one another. These terms imply, respectively, 'legal' vs 'illegal' and 'forced' vs 'voluntary' migration movements, creating conflict and positioning the two groups on binary, opposing sides, through which they are reduced to 'the "good" vs. the "bad" migrant' (Apostolova 2015). Research points to the 'categorical fetishism' behind these terms and categories – i.e. the issue that these categories are seen as simply existing, with little consideration for the social constructs behind them (Apostolova 2015; Crawley and Skleparis 2018). Additionally, scholars also warn that word choice is often the product of a strategy and hence political actors may manipulate terms (Apostolova 2015; Wodak 2011). From this perspective, our current research analyses discourses on the reception of non-EU migrants[1] in Poland in times of crisis. It focuses on official discourses produced by political actors in Poland and compares three crises: the 2015–2016 migration crisis, the 2021 Polish–Belarus crisis and the 2022 Russian invasion of Ukraine. Through this comparison, we seek to investigate the use of migration categories in discourse, by answering the following research question: How is the binary 'refugee' vs 'migrant' addressed in Polish political discourses and how does this schematic opposition contribute to the argumentation of Polish officials on Europe in times of crisis? Based on a qualitative analysis of official political discourse on these crises, we observe the different discursive and official political reactions in Poland to non-EU migrants entering the country and the EU. We also investigate what this discourse means with regards to Poland's relationship with the EU.

Our article is structured as follows: we start by reviewing the main events and reactions during the aforementioned crises and then develop the reasons why investigating how people are referred to and labelled matters in contemporary Polish politics. After a brief presentation of our analytical frame, methodology and data, our analysis focuses on the argumentative, semantic and symbolic dimensions of the words used to refer to non-EU migrants and concludes with a discussion of Poland's relationship with the EU in the context of this differentiated reception of non-EU migrants. We conclude that Poland's political discourse on both non-EU migrants and the EU share some instrumental underpinnings: the opposition in discourse between 'migrants' and 'refugees' is stressed by Polish authorities' attempts to legitimise competing policies, with important implications when it comes to membership rights, while the EU is mostly depicted under the prism of gain and profit for Poland.

Context: situating Poland in crises related to migration

Three critical moments when it comes to migration to Poland and to Europe make up the context of our discursive analysis: the migration crisis of 2015–2016, the border crisis between Poland and Belarus in 2021–2022 and the Russian war on Ukraine beginning in February 2022. All of these moments in this article are considered as crises, that is to say, as transformations of social and political systems triggered by critical situations (Dobry 2009: 35). Events of this kind have been considered as critical junctures for the EU when it comes to solidarity (Crawley 2016; Takle 2017) or the governmentability of migration (Tazzioli and Walters 2016). Each of these crises has had profound impacts on Poland, especially at the discursive level.

Although being highly politicised, the 2015–2016 migration crisis had little direct impact on Poland. The country was indeed not on the route the most frequently taken by people seeking to enter the EU. Additionally, the Polish authorities rejected the EU's relocation schemes – i.e. the EU solidarity-based mechanism to relocate asylum-seekers from member states highly impacted on by the crisis – notably Italy and Greece – and consequently welcomed only a limited number of people to its territory (Guild, Costello and Moreno-Lax 2017). The crisis, however, impacted on Polish discourse on refugees and migration, as well as regarding its relations with the EU. Following the rejection of the relocation schemes proposed by the European Commission in May and September 2015, a bitter battle with EU institutions ensued (Frelak 2017). At the domestic level, migration has been used as an issue to stir up debate between the different political parties, notably in the run-up to legislative elections in October 2015. After the victory of the right-wing Law and Justice Party (*Prawo i Sprawiedliwość* – PiS) in the elections against the former ruling party, Civic Platform (*Platforma Obywatelska* – PO), PiS' use of anti-refugee and anti-immigration rhetoric had a significant impact on the public sphere (Krzyżanowska and Krzyżanowski 2018) resulting in an increased polarisation and securitisation of migration (Pędziwiatr 2019). Another important event during the 2015 crisis was the establishment of the EU–Turkey deal, which attempted to limit the number of refugees coming to Europe. The deal was concluded in March 2016 and aimed at restricting the number of Syrian refugees arriving illegally. The deal included significant financial help to Turkey in exchange for the country taking measures to stop irregular travel from Turkey to the Greek islands. Furthermore, Syrians fleeing to the EU from Turkey illegally would be returned. However, for each irregular Syrian returned, the EU would agree to resettle one Syrian from Turkey to the EU. This externalisation of EU migration policy to third countries was seen as an overall positive development by Polish political actors, especially from the governing majority (Thevenin 2021).

Contrasting with the previous migration crisis, the 2021 border crisis – also often referred to as a 'humanitarian crisis' (e.g. Balicki 2022; Grześkowiak 2023; Pietrusińska 2022) – presented Poland with a direct challenge. An unprecedented number of people, notably from the Middle East (e.g. from Iraq or Afghanistan), sought to cross the Polish–Belarusian border to reach the EU, beginning in the summer of 2021. The Belarusian authorities were accused of facilitating the arrival of people at the border in retaliation for the restrictive measures imposed by the EU following the 2020 Belarusian presidential elections, including an asset freeze and travel ban (Consilium 2023). The situation at the Polish–Belarusian border – being also the EU's external border – resulted in the construction of new border fences and increased border patrols. The situation at the border has been fiercely criticised by non-governmental organisations (Pietrusińska 2022). More-critical and normative research points to the lack of respect for international law, human-rights standards and fundamental ethical principles of Polish authorities in the management of the crisis (Balicki 2022; Bodnar and Grzelak 2023). Furthermore, the systematisation of pushbacks at the border by Polish authorities represented a breach of EU laws by Poland (Grześkowiak 2023).

The Russian war on Ukraine, which began on 24 February 2022, triggered a large-scale movement of people. As of November 2022, over 7.8 million refugees from Ukraine sought refuge in Europe (UNHCR

2023). Poland became the first point of entry to the EU, as well as the main country of reception. Contrary to the two previous crises, Ukrainian refugees benefited from a more positive portrayal in the media (Zawadzka-Paluektau 2022), as well as from the positive attitudes generally held by Poles (Karakiewicz-Krawczyk, Zdziarski, Landowski, Nieradko-Heluszko, Kotwas, Szumilas, Knyszyńska and Karakiewicz 2022). This position calls into question the reasons behind accepting only certain asylum-seekers. According to De Coninck (2022), the symbolic threat posed by refugees from Ukraine compared to those from Afghanistan differs due to intangible cultural factors such as religion or values.

Although the implications for Poland differ, we believe that these three crises share common grounds for comparison. All three crises indeed imply the movement of non-EU migrants seeking to enter and stay in the EU. Moreover, all had implications for the EU: the establishment of relocation schemes and the transferred responsibility of the crisis and its management to third-party countries during the 2015–2016 migration crisis, the (security) management of the EU external border in 2021, and the EU's sanctions against Russia in 2022. As such, these crises are great material through which to investigate Poland's relationship with non-EU migrants and the EU. The PiS right-wing party – in power in Poland since 2015 – has been keen to use both anti-immigration and Eurosceptic populist arguments in their discourse (Csehi and Zgut 2021; Thevenin 2022). Since the party's election in October 2015, Poland and the EU's relationship has become increasingly conflicted, not only with regards to migration and asylum policy but, more generally, concerning rule-of-law matters and the EU's founding values. Indeed, PiS' controversial reforms and subsequent control over the judiciary and most of the public media has created an unprecedented rule-of-law crisis in the EU (Soyaltin-Colella 2022). Such illiberal tendencies and breaches of the rule of law – also observed in Hungary – have greatly challenged EU institutions (Moberg 2020; Pech and Scheppele 2017). The triggering of Article 7 of the Treaty on the European Union against Poland in December 2017 illustrates the still-ongoing conflict between the Polish government and EU institutions.

Against this backdrop, we need to stress the differences between these crises. First of all, Poland's role and place in the crises shifted. Poland was not a direct country of entry in the EU in 2015 although it was during the two ensuing crises of 2021 and 2022. Secondly, the emotional, cultural and political proximity and distance *vis-à-vis* the countries of origin of incoming people differed, with Poland being particularly close to Ukraine in this matter in comparison to other countries of origin of people on the move (De Coninck 2022). As analysed by Abdelaaty (2022), the identity of incoming people matters: 'shared racial, linguistic and religious ties increase the acceptance rate of asylum applications'. Thirdly, the image and perception of the war differed. The Russian war against Ukraine in 2022 stood out as the clear aggression by one country against another, triggering an opposition between good and bad grounded by a certain simplicity. This somewhat black-and-white ideological position swayed public opinion in Poland and urged the country to help Ukraine. However, such was not the case in prior crises. The long, complex, international conflict with the many parties and actors involved in Syria and other countries in the Middle East made discerning who was 'good' or 'bad' significantly more complicated, thus not necessarily triggering a similar response in the public's mind. Finally, in the case of Poland, Russia is often considered to be a historical enemy of the country (Góra, Mach and Styczyńska 2022), thus considerably affecting the country's support for Ukraine against a common enemy. In this vein, Poland and other neighbouring countries might also fear that they could be the next to be attacked by Russia, thus influencing acceptance. Abdelaaty (2021) indeed points out that countries are more accepting towards people fleeing a rival government rather than an allied one. These three crises thus exemplify disparities in the reception of migrants and how 'various groups of refugees are treated' (Halemba 2022: 10), explaining our motive to compare them in discursive terms.

Theoretical approach: the words of migration

Numerous studies delve into the discourse on migration, investigating how migration is framed and narrated by various public and political actors (e.g. Reisigl and Wodak 2001; Rheindorf and Wodak 2020; Triandafyllidou and Kouki 2013; van Dijk 2018; Wodak 2011, 2015, 2017). Different methods are used, particularly frame analysis (e.g. d'Haenens and de Lange 2001), (critical) discourse analysis (e.g. Krotofil and Motak 2018; Wodak 2020), discourse-historical analysis (e.g. Bates 2023; van Leeuwen and Wodak 1999) as well as corpus linguistics (e.g. Baker, Gabrielatos, KhosraviNik, Krzyżanowski, McEnery and Wodak 2008). Overall, research on migration discourse points to the process of securitisation of migration (Bigo 2002; Huysmans 2006; Léonard and Kaunert 2020) and its interplay with human rights (Milioni, Doudaki, Tsiligiannis, Papa and Vadratsikas 2015). Furthermore, analyses of media coverage on migration and asylum are abundant (e.g. Eberl, Meltzer, Heidenreich, Herrero, Theorin, Lind, Berganza, Boomgaarden, Schemer and Strömbäck 2018; Greussing and Boomgaarden 2017; Horsti 2008) and illustrate processes of the politicisation and mediatisation of migration (Baker *et al.* 2008), which were reinforced during and following the 2015–2016 migration crisis (Krzyżanowski, Triandafyllidou and Wodak 2018). Finally, research on migration discourse often takes into account the specific words and categories by studied actors used to refer to people on the move. Boomgaarden and Vliegenthart (2009), for instance, focus on the news coverage in Germany connected to 'immigrants', while d'Haenens and de Lange (2001) study Dutch newspapers' framing of 'asylum-seekers'.

The increased salience, politicisation and mediatisation of the migration crisis in 2015 sparked a lexical debate regarding the words used to refer to people on the move (Apostolova 2015; Calabrese 2018). Calabrese (2018) argues that terms have deeper meaning than their dictionary definitions and that those meanings evolve in tandem with social representations. Context is crucial to observing changes in meanings. She further suggests that the 2015 migration crisis acted as a moment of 'semantic instability', during which the uses and meanings of words were re-considered and re-negotiated by social, political and media actors (2018: 109).

Within this lexical debate is situated the binary opposition between the terms 'refugee' and 'migrant'. While these two terms refer to different legal as well as practical categories, 'refugee' has often been used, since the crisis, as a way to legitimise certain migration movements over others. Scholars argue that the strict opposition between forced and voluntary migration in practice reflects the reality and multiple motives of people on the move less and less (Collyer and de Haas 2012). Crawley and Skleparis (2018: 59) argue that this opposition is used to exclude some people: 'This is not merely an issue of semantics. Categories have consequences. They entitle some to protection, rights and resources whilst simultaneously disentitling others'. Against this background, Crawley and Skleparis argue that these categories fail to convey the complexity of migration movements and mostly serve political purposes. The authors hence encourage other scholars to further examine the 'politics of bounding', i.e. how categories are created and the purpose they serve (2018: 60–61). The (re)consideration of these categories also echoes studies on membership categorisation, building on the work of Sacks (1972, 1995), who discusses how social categories work as 'membership categorization devices' and hence reflect on belonging, inclusion and exclusion. As developed by Permoser (2017), membership rights in European polity depend on these 'politics of categorisation'.

The binary opposition between the lexical categories of 'migrant' and 'refugee' also suggests an inherent notion of deservingness in migration discourse. Particularly during the 2015 migration crisis, political discourse stressed the 'opposition of *deserving* refugees and *undeserving* or *deceptive* economic migrants' (Paynter 2022: 293). Abdelaaty and Hamlin argue that, throughout their research on political discourse, 'the term refugee conveys or is conflated with deservingness' (2022: 237). As such, the use – or non-use – of this term invokes deservingness and is – as previously explained – part of political ideologies and strategies. Analysing the situation and conditions of asylum-seekers in Italy, Paynter (2022) argues that deservingness is also embedded in racially

based processes of exclusion. In a similar vein, Holmes and Castañeda talk about a 'hierarchy of deservingness', which 'reflects arrangements of race that are interpenetrated by US and European political-economic interests' (2016: 19). This racialised notion of deservingness, crucially leading to discrimination and exclusion, needs to be considered in light of the social construction of identity and alterity.

Wodak (2011: 57), in her study of inclusion and exclusion, conceptualises these dynamics as relying on the 'discursive construction of in-groups and out-groups'. She further develops the notion that collective identity formation, as well as identity politics, is based on the discursive opposition between the Self – often framed positively – and a negatively perceived Other. Triandafyllidou (2006) acknowledges that migration often relies on this inclusion/exclusion, in-/out-groups and Self/Other dynamics, as migrants – in a general sense – are often perceived as significant Others for the national community. The Othering process of migrants reflects 'hierarchies of entitlement' upon which 'immigrants and various "others" are taxonomically categorized' (Kirtsoglou and Tsimouris 2018: 1879). Alterity is thus reflected through the process of categorisation of migrants and refugees. The notion of proximity and alterity are also intrinsically linked. (Cultural) proximity indeed plays an important role in the categorisation and racialisation of migrants (Rzepnikowska 2023).

Against this backdrop, the aim of our study is to analyse two similar and therefore comparable political speeches in order to distinguish the means of creating alterity and proximity by using the words 'refugee' and 'migrant'. This linguistic approach is based on an argumentative discourse analysis approach. Argumentative discourse analysis consists of several aspects. To understand the discursive construction of alterity/proximity with the use of the terms 'refugee' and 'migrant', the linguistic aspect is the most relevant. It consists of analysing the lexical, declarative choices made by the speaker in his or her argumentative dimension (Amossy 2000). At a broad level, discourse analysis takes into account the context of production of a text, including it in a *discourse*, which is understood as a linguistic *genre* – a category that allows a text to be included in its social context (Rastier 2011). Like Amossy (2016), we consider that *argumentation* is what happens when two or more divergent opinions on the same subject are expressed and the parties involved try to impose theirs as the best. In political discourse, argumentation is the result of a complex process of the association and dissociation of knowledge and beliefs conducted by the involved parties and depending on their prestige, authority and legitimacy as well as on the characteristics of the situation of utterance (Charaudeau 2005).

Analysed data and methodology

Our corpus is composed of two speeches made by official members of the Polish state authorities , during which this representative spoke with the press about non-European migrants coming to the European Union and to Poland. These two selected speeches serve as illustrations of official political discourse on migration at distinct periods. We do not look at politicians *per se* but focus only on their production of discourse in a power position. Although these politicians do differ in terms of prerogatives, one being the head of government and the other the head of state, they are both participating in establishing and regulating political life in Poland – hence the importance of analysing their discourse. These speeches have been selected because they have had a significant circulation and impact within the Polish public sphere. Both had repercussions on the (inter)national arena, garnering widespread media coverage. The material consists of transcribed videos[2] and comes from governmental YouTube channels. As this study focuses on the discursive construction of alterity and proximity within the selected texts, the transcription does not include the schematisation of prosody – that is to say, the phonetic specificities of oral speech. However, taking into account issues related to the transcription of oral material (Kerbrat-Orecchioni 2017), in some cases where the end of a sentence cannot be clearly determined, arbitrary decisions have been made in consideration of the length and coherence of the written text.

The first speech comes from a press conference organised after a European Council summit on 18 March 2016 featuring Poland's Prime Minister (PM) Beata Szydło. The summit aimed to manage the migration crisis of 2015–2016. The press conference is entitled '*Premier Beata Szydło o porozumieniu UE-Turcja w sprawie migrantów: jest dobre dla wszystkich stron*' (Prime Minister Beata Szydło on the agreement between the EU and Turkey in the case of migrants: it is good for all sides). It was published on the official YouTube channel of the Prime Minister's chancellery and lasts approximately 23 minutes with 2,700 words (Kancelaria Premiera 2016). In this speech, PM Szydło expresses the Polish government's official view on the aforementioned crisis. The conference starts with a declaration from the Prime Minister and then journalists from Polish TV and radio, monitored by a moderator, ask her 6 questions in total.

The second analysed speech was given by the Polish President Andrzej Duda to the international press in the Vatican, after an audience with Pope Francis. It broaches the subject of the invasion of Ukraine by Russia in 2022. The video, entitled '*Wypowiedź Prezydenta po audiencji u Papieża Franciszka*' (Declaration of the President after the audience with Pope Francis), was published on the personal channel of the Polish President (Prezydent RP Andrzej Duda 2022). It took place on 1 April 2022 and lasted approximately 22 minutes with 2,650 words. President Duda summarises his audience with Pope Francis before answering 9 questions from journalists. The speech mostly focuses on 'refugees' from Ukraine but the situation at the Polish–Belarusian border is also mentioned as it is brought up by a journalist.

Institutional discourse – in this case, discourse produced by political national institutions represented by state officials (Krieg-Planque 2017) – has several functions. At an international scale, it has a diplomatic effect, regulating the relationships between states (Krieg-Planque 2017), who shows that, generally, discourse production is essential to institutions because it ensures the creation, transmission and transformation of their ideological basis to guarantee both existence and legitimacy. As our corpus features press conferences, these also share the characteristics of this *genre* of mediatised discourse which consists mostly in phrasing and rephrasing according to specific interests (Krieg-Planque 2017). Press conferences are an 'institutionalized form of public performance', where one or several public character(s) aim at gaining attention from the media while conveying a message (Ekström 2007: 1). As the author states: 'The political press conference is an arena where two institutions meet – politics and journalism (…). For politicians, the press conference is a way to win legitimacy and popularity, whereas for journalists it is an occasion to ask critical questions' (2007: 1). This polyphonic construction of discourse, shaped by politicians as well as journalists, is also influenced by the plurality of addressees (Amossy 2016), while the speakers are influenced by their own representation of the auditory stimuli (Perelman, Olbrechts-Tyteca 2008). As our study focuses on official Polish discourse, only the argumentation of President Duda and PM Szydło will be examined in detail. We do, however, take into account journalists' questions as the triggers of 'pressing and tricky questions' asked to the politicians to test their ability to answer them (Ekström 2007: 2).

The generic and argumentative approaches allow for a better understanding of the context that shapes the Polish official discourse on alterity and proximity. Our analysis primarily focuses on the enunciative common points of the two selected speeches and the way in which they influence their argumentation. It continues with the use of semantics, understood as the study of linguistic meaning (Hébert 2001) to analyse the occurrences of 'migrant' and 'refugee' within President Duda and PM Szydło's speeches. Semantics enables a focus on precise terms as well as a detailed comparison of their meaning in discourse. In this case, it includes two steps: firstly, commonly accepted definitions of 'migrant' and 'refugee' are identified; secondly, these definitions are compared with the meaning associated with the terms within the selected speeches. To determine meaning, the occurrences of 'migrant' and 'refugee' are taken with their left and right collocations. This semantic approach is combined with the study of argumentative schemes (*topoi*) that shape discourse (Krzyżanowski

2020; Wodak 2011) as well as other rhetorical means that shape the general argumentation on alterity and proximity, such as metaphors and *pathos*.

Enunciative dimension: addressing national and supranational audiences

The two official speeches from the Polish authorities selected for this article share similarities and show differences that are at the heart of our analysis and comparison. While the context differs, both occurrences can be considered as examples of 'crisis discourse' since both were produced in a context of crisis and as a means of confronting the crisis in question. Furthermore, both argumentative lines implicate a supranational frame of reference. PM Szydło suggests that the EU ought to provide protection against unwanted immigration to Poland:

> *The Polish government is saying very clearly and explicitly that we want migrant problems to be solved outside the borders of the European Union*.[3]

While the former Polish PM refers to the EU to justify Polish governmental positions regarding migrants, President Duda appeals to Christian values to legitimise official decisions concerning the welcoming of Ukrainians in 2022:

> *For me* [it was] *an extremely important conversation with the Holy Father, Francis, whom I thanked for his spiritual protection, for his prayer for our country, for Poland, for the Poles, because this prayer continues unceasingly for Ukraine and for the Ukrainian people at this extremely difficult moment, for the condemnation of the war*.[4]

The circumstances of the press review speak for themselves as the Polish President is relating his meeting with Pope Francis precisely about the Ukrainian 'refugees' to the press. The first part of President Duda's speech establishes him as a pious man and extends this quality to all Polish citizens: 'Well, and extremely important also for us Poles, the last touch of presence on the Vatican grounds'.[5] In the excerpt, he justifies the help given to Ukrainians with a syllogism: as the Pope is the spiritual head of the Christian world, he is supposed to pray for every Christian. Poland is a Christian country and so is its neighbour, Ukraine, therefore the Pope should spiritually help Ukraine.

Moreover, both speeches share numerous addressees who shape official Polish discourse on migration. As state authorities speaking in their country's official language in front of an assembly of journalists, they primarily address the press with the aim of broadcasting their message. In PM Szydło's case, journalists represent only the Polish media whereas, for President Duda, Polish journalists are mixed with journalists from other countries. However, even when the speech is directed at Polish nationals, it uses – as mentioned above – a supranational frame of reference that contributes to the legitimisation of its discourse. In this regard, PM Szydło's message is also addressed to the EU, seen as a gathering of institutions; that of President Duda is addressed to a European community based on the shared values of Christianity. Finally, as both speeches are available online, one could say that they can reach an international community of viewers. Nonetheless, this does not seem to be their intent, since PM Szydło's speech on YouTube only offers Polish subtitles while President Duda's speech, delivered entirely in Polish, does not make use of subtitles at all. In both cases, Polish-speaking people are clearly discernible as the target audience.

Semantic and argumentative dimensions: differentiating between 'refugees' and 'migrants'

In the selected discourses, people on the move are referred to using two different terms: '*uchodźcy*' (refugees) and '*migranci*' (migrants) which, as in English, do not carry the same meaning. They are employed by PM Szydło and President Duda to talk alternatively about the so-called 'migration crisis' of 2015–2016 – which saw the arrival of hundreds of thousands of people seeking refuge in the EU – and the Ukrainians fleeing war in 2022.

The aforementioned UNHCR definitions of 'migrant' and 'refugee' allow room for interpretation since, in both cases, fleeing from one's country can be caused by life-threatening contexts. However, from a lexicographical point of view, only 'refugees' flee whereas 'migrants' leave their country for better life conditions.

In PM Szydło's speech, there are 7 occurrences of the word 'migrant', out of which 6 come from PM Szydło herself, whereas journalists mostly used the word 'refugee' when asking her questions. This indicates that both the Prime Minister and journalists chose their terms consciously and that they are not considered to be equivalent. The first round of questions and their answers seems to indicate a preference among journalists to use 'refugees' as well as reluctance from PM Szydło to do so. When the Prime Minister is asked: 'How many refugees can [Poland] host and at what frequency?'[6] by Marcin Czapski from TVP (the Polish official TV channel), she avoids re-using the same term. Non-EU migrants are referred to by Szydło as 'people' in an indefinite and impersonal fashion: 'For (…) these people',[7] 'The delimitation of the kind of people that could come to Poland',[8] 'The kind of people who might want to come to Poland'.[9] PM Szydło's wording shapes the image of migrants as an indistinct mass that must be handled with caution, as she adds: 'We will certainly proceed as we have so far, very cautiously, primarily focusing on the security of Polish citizens'.[10] The use of two conditionals to mention the arrival of 'migrants' underlines both the reluctance of the Polish government to host them and the idea that their coming to Poland is somewhat hypothetical.

President Duda, in his press conference, uses only 'refugees' except in 1 case. When a journalist asked him whether he considered that some kinds of 'refugees' were better than others, he explained:

> *As I said, very rich people are fleeing* [from Ukraine] *and less well-off people are also fleeing, people who have a lot of property are fleeing, people are fleeing who have not managed to take anything from their homes because they have literally fled from bombs and these are refugees – and international law calls these people refugees. And there* [at the Belarusian border] *we had migrants who came to Belarus on planes, they could afford the plane tickets*.[11]

President Duda's explanation seems to match the lexicographical definitions for 'migrant' and 'refugee' since he qualifies the Ukrainians as 'refugees' and people at the Belarusian border as 'migrants' based on whether they have/had the choice to leave their country or not. Thus, he discards wealth as a criterion to distinguish between 'migrants' and 'refugees'. Rich Ukrainians had to flee the war as well, as President Duda affirms: 'We also have people coming to us from Ukraine who are very wealthy, who live in Poland in hotels that they finance/pay for themselves, who arrive in luxury cars and who are refugees as well'.[12] President Duda implies that these people will not stay in Poland, whereas 'migrants' at the Belarusian border, who went to the trouble of buying plane tickets to a remote country such as Poland, are prepared to leave their country permanently in order to live in the EU. In fact, Belarus promoted discounted plane tickets and facilitated the reception of 'hunting' or 'tourist' visas, in a process of weaponisation of migration (Filipec 2022).

In both PM Szydło's and President Duda's press reviews, the use of 'refugees' and 'migrants' primarily matches the official and lexicological definitions of the terms but is adapted to fit the political needs of the speakers. PM Szydło emphasises the voluntary aspect of the decision to leave one's country, to come to Poland

and to the EU by using the term 'migrants'. President Duda discards wealth as a criterion to qualify Ukrainians as 'migrants' since they are expected to go back to Ukraine when the war ends, whereas people at the Belarusian border, as longer-term residents who did not choose the closest safe country to move to and who seek to enter the EU, qualify as such.

A syntagmatic analysis of the occurrences of 'migrants' and 'refugees' suggests that greater meaning is attributed to the terms by PM Szydło and President Duda. In PM Szydło's speech, where most occurrences of 'migrants' are, the term is not preceded or followed by any complements. The term is itself employed as complement to phrases like '*w sprawie*' (in the case of), '*problemy –/ z*' (problems of/with) and '*mamy do czynenia z*' (we have to deal with), thus emphasising the illegality of their presence. These so-called 'migrants' are de-agentified and the issue of migration is presented as a simple problem to solve: 'This is, of course, in line with the expectations of Poland, which, ever since we took over the government in Poland, the Polish government has been saying very clearly and explicitly that we want the problems of migrants to be solved outside the borders of the European Union'.[13]

This de-agentivisation is further stressed by the use of passive phrases whenever 'migrants' are concerned. The only exception, where 'migrants' are active agents, is connected to movement. In President Duda's speech, there are two occurrences: '[*migranci*] *napływali do Europy*' ([migrants] flowed to Europe) and '[*migranci*] *przylatywali na Białoruś*' ([migrants] who flew in to Belarus). The first occurrence can be linked to the metaphor of the wave coming to submerge Europe, used twice by PM Szydło, as in the following extract: 'The aim of this agreement is first and foremost to stem the tide of illegal migrants that has been flowing into Europe'.[14] The metaphor of the 'flood' has been used before by Antoni Macierewicz, Minister of Defence (PiS) in 2015, concerning the 2014–2015 'refugee crisis', an argument which is a part of a *topos of threat* to Polish national security (Krzyżanowski 2018). El Refaie (2001) shows how water has become a 'naturalised' metaphor with which to refer to incoming people. Water metaphors are built on the idea of invasion, often reinforced by past cultural experiences (Charteris-Black 2006). They participate in the dehumanisation of refugees and/or migrants, as well as in the securitisation of migration by suggesting that invasion be controlled and that protection be given against an outside threat (Charteris-Black 2006). On 27 September 2021, a few months after the start of the crisis at the Belarusian border (July 2021), the *topos of threat* was officially presented by the Polish government at a press conference given by Stanisław Żaryn – the director of the National Security Department – and Mariusz Kamiński, the Minister for Internal Affairs and Administration (Ministerstwo Spraw Wewnętrznych i Administracji 2021). In a document that is accessible on the Polish government's official website to this day, they exposed material allegedly taken from 200 migrants' smartphones at the Polish–Belarusian border which depicted some of them as radicalised Islamists, Russian agents, drug addicts, paedophiles or zoophiles.

Whereas 'migrants' are considered as an indistinct mass, in the shape of a wave trying to invade Europe and which needs to be brought back to the EU borders, 'refugees', is employed by President Duda with highly positive connotations as far as Ukrainians are concerned. The following extract shows how the President stresses the proximity of and closeness between Poland and Ukraine and uses *pathos* to justify the help provided by Poland:

> *I told the Holy Father how we welcome refugees, whom we call our guests from Ukraine, because they are our neighbours who have found themselves in an extremely difficult situation, who are fleeing from war, from death, from Russian bombs that are falling on their homes, to whom we try, with all our strength and capacity, to provide assistance*.[15]

Several relative clauses bring the Ukrainians closer to the Polish people as a whole: 'refugees' are firstly considered as *guests*, then as *neighbours*, the former being used twice through the speech, in a grammatical structure that makes them synonyms. In addition, numerous possessive determiners ('our guests', 'our neighbours') can be found in several other places in the studied text. 'Migrants', however, lose agentivity in PM Szydło's speech, while the register regarding 'refugees' in President Duda's invokes, in many ways, *pathos*. This is well illustrated in the quote above, where numerous relative clauses help to create empathy with the 'refugees', through hyperbole. The President describes their 'extremely difficult situation' and his intention to provide aid to Ukrainians 'with all our strength and capacity'. *Pathos* is also present when the President mentions wealthy Ukrainians as being 'refugees' as well: 'People from Ukraine, who are very wealthy, (...) are also refugees, they have had to flee as well, because their homes very often in Ukrainian cities, in luxurious neighbourhoods are at risk of being demolished today, today their life is threatened just like everyone else's'.[16]

The semantic analysis of 'migrant' and 'refugee' in both texts shows a rhetoric of proximity and distance depending on the situation. In PM Szydło's speech, 'migrant' is associated with illegality. Furthermore, migrants are de-agentified and treated as a problem. She is also reluctant to use the word 'refugees', unlike President Duda, who uses only 'refugees' to refer to Ukrainians. The only occurrence of 'migrants' concerns people on the move stuck at the Belarusian borders. These individuals are denied legitimacy and depicted as migrants who have purchased plane tickets, suggesting that they have had time to prepare for their travel and therefore do not find themselves in a dire situation, contrary to the Ukrainians fleeing the war for a neighbouring country.

In sum, the differentiated view and discourse on 'migrant' and 'refugee' reflect both their perceived deservingness, as well as their alterity or proximity *vis-à-vis* the national community. As argued by various scholars, this opposition has a crucial impact when it comes to (membership) rights (e.g. Hamlin 2021; Permoser 2017). In the Polish context reviewed here, this point is exemplified by Ukrainian 'refugees' being welcomed in Poland, while those perceived as less-deserving 'migrants' are denied entry.

Supranational dimension: Poland's relation with the EU

As these crises had great implications for the EU, our analysis also touches upon Polish discourses on the EU. We seek to understand the vision(s) of Poland's relationship with the EU that is/are embodied by Polish political actors' discourses on migration.

With regards to word frequency, Europe is more central to PM Szydło's speech (which contains 39 occurrences of 'EU' or 'Europe') while, in President Duda's speech, the EU sits adjacent to the main discussion and is evoked 7 times. The repetition of 'Europe' in the case of PM Szydło mostly makes reference to the newly signed agreement between the EU and Turkey to deter migration to Europe. Her discourse therefore contains repeated references to EU institutions (European Commission; European Parliament). Although a fierce dispute with EU institutions had just begun at the time of her speech following the rejection of the relocation scheme by the newly elected Polish parliament, PM Szydło's discourse on EU institutions regarding the EU–Turkey deal remains mostly positive. She indeed stresses that Poland wants to maintain good relations with EU institutions: 'We want to build good relations between Poland and the European Commission and the European Parliament'.[17] She further stresses that, for the Polish authorities, Poland's membership in the EU is crucial: 'We are a member of the European Union, we are a member of these institutions, then we want a good climate and we want Polish affairs to be dealt with at home and not here outside'.[18]

In this last excerpt, PM Szydło seeks to differentiate herself from the previous (PO) government which, according to her, 'worked very hard here yesterday to discredit Poland in the eyes of European opinion'.[19] She

therefore opposes domestic political opposition, rather than the EU. This move needs to be considered from a utilitarian perspective: Poland is actually seen as benefiting from the EU–Turkey agreement. She indeed repeatedly stresses that the agreement 'meets all of Poland's expectations'[20] and that it stands as 'a chance to solve this European migration crisis',[21] providing that both parties commit to implementing the deal. Little criticism of the EU institutions can thus be discerned in her speech although, in practice, the relationship between the Polish government and the European Commission was rife with tension at the time due to the refugee relocation scheme.

In connection to the EU–Turkey deal, PM Szydło highlights the security dimension of the crisis, focusing on the fact that the agreement aims at providing more security and ensures that 'conditions that are safe for Polish citizens are also safe for those who would like to come to Poland'.[22] According to PM Szydło, this security must include scrutiny of and decisions about incoming people: 'We want to have the right to make a choice, to determine which people could come to Poland'.[23]

The quasi-absence of mention of the EU in President Duda's speech regarding the war in Ukraine suggests that decisions regarding the reception of Ukrainian refugees were mostly made domestically, without involving the EU. The EU is indeed mentioned only when journalists inquire about the situation at the Polish–Belarusian border. Their question about 'whether there are series A and series B refugees'[24] hints at the differential treatment at the Polish border. President Duda's answer points to the fact that the situation of 'refugees' from the Russian war in Ukraine completely differs from the hybrid attack coordinated by Belarus at the border. He contrasts these two groups of people by underlining their values:

> *So, on the one hand, please close the [Belarusian] border, please guard the border, on the other hand, please open the border immediately, let all these people in, we will talk to them, we will offer them our homes, we will offer them our help, (...). Why? Because everyone can see what the difference is and everyone understands that the newcomers from Ukraine, our guests from Ukraine, the refugees from Ukraine today need help. Any of us could find ourselves in this situation and someone is in the European Union looking for a better life, very often living in their own country in very decent conditions but I don't know, I think the welfare is very good and you won't have to work in the European Union, you'll just get money from governments in Western Europe for nothing, no! Poles understand very well that anyone who wants to live a normal life should work hard*.[25]

In this excerpt, President Duda differentiates non-EU migrants. On the one hand, migrants at the Polish–Belarusian border represent a homogenous group of people who come to Europe in order to benefit from social services without contributing to the economy and host society. President Duda further stresses that people from the Middle East arriving through the Belarusian border are looking for 'a better life in the European Union, in the German Federal Republic and in other countries in Western Europe',[26] pointing out that Poland is only on their way but not a final destination. Against this background, the border should be closed. On the other hand, President Duda pictures Ukrainian 'refugees' as victims of the Russian war. Through this distinction, President Duda also points to differences in the EU, whereby Western European member states are seen as probably wealthier but giving away money to incoming people without expecting them to contribute while, once again, President Duda stresses Polish values of hard work.

Like PM Szydło's discourse in 2016, President Duda stresses security concerns *vis-à-vis* the situation at the Polish–Belarusian border:

> *Illegally crossing it* [the border], *therefore, we simply fulfilled our obligations resulting from membership in the European Union, resulting from NATO membership, having, I want to emphasise, having the absolute support of the absolute majority of Polish society in defence of this border*.[27]

Here, the Polish President seeks to legitimise the implementation of security measures at two levels. First, he insists that the protection of the EU's external border illustrates Poland's membership in the EU. Furthermore, he stands firm on the fact that the protection of the border from non-EU migrants is democratically embedded in the will of Polish citizens. From this perspective, President Duda views the Polish government as responding to both domestic and Europe imperatives.

We can see that, in official discourses on non-EU migrants coming to Poland, the EU still remains an important component. While, in 2016, PM Szydło's discourse tries to soften the tensions with the EU from the perspective of the gains from the EU's deal with Turkey, President Duda brings Poland's actions to the forefront when it concerns the help extended to Ukrainian 'refugees' and the protection of the EU's external border. Both therefore seek to stress the importance of Poland's membership in the EU, especially in a context where Poland might benefit from the EU's actions. This observation echoes research on Polish views of the EU, stressing that 'the EU is portrayed as a source of economic profit, while the identity or value dimension is lacking' (Mach and Styczyńska 2021: 116). From this perspective, in PM Szydło's discourse, Poland is clearly pictured as benefiting from the EU–Turkey deal. President Duda's discourse, instead, puts forward Poland's actions while also stressing them as protecting the EU. Both share a quite utilitarian vision of the EU, in which Poland might gain from staying an active member state, in spite of ongoing conflict over the rule of law.

Conclusions

In this article, we have investigated discourses on non-EU migrants at different points in time, as well as ensuing discourses on the EU. The chosen texts belong to a larger corpus of Polish official discourse on migration to Poland. As such, the selected addresses share several characteristics, even though their momentum is different. Firstly, they were produced in a context of crisis by Polish officials. Secondly, they are directly addressed to the press, primarily national and, to a lesser extent, international. Through them, the orators speak both to Polish citizens and to other institutions, whether official (the EU for PM Szydło) or symbolic (the Christian world for President Duda), legitimising their decisions and negotiating their position discursively within the said entities. Thirdly, even though the use of 'migrants' and 'refugees' complies at a primary level with the official and lexicological definitions of both concepts, their use in both speeches accomplishes a similar task by creating a sense of proximity or alterity with certain non-EU migrants. The word 'migrant' is used by both political leaders to stress alterity and to de-agentify human beings by transforming them into problems that have to be solved. These 'migrants' are denied nationality and are presented as an indistinct mass and a wave that threatens not only European borders but, first and foremost, the security of Poland. This repetitive *topos of threat* is often found in discourses on migration, in Poland and abroad (e.g. Bennett 2018; Wodak and Boukala 2015a, 2015b). The term 'refugee' is used only in President Duda's speech in the case of Ukrainians fleeing the invasion of their country by Russia. The occurrences and collocations show a high degree of discursive proximity between Ukraine and Poland, geographically as well as symbolically. Although the combined argumentative and semantic analysis of the selected texts, embedded in a *genre*, differs from most recently conducted studies on the Polish political discourse on migration, it nonetheless allows for a comprehensive analysis of the parameters that shape political discourses and their variations. Echoing Hamlin (2021), this opposition between 'refugee' and 'migrant', which seems apolitical, happens to be a significant – and

'dangerous' – political tool with which to legitimise stricter asylum and immigration policies, notably with border controls excluding certain people (2021: 157). Permoser (2017: 2541) further warns that the 'categorisation of migrants into hierarchically defined statuses can work both as a basis for rights restrictions and as a mechanism for the expansion of rights'. As shown in our study, the discursive opposition between 'migrants' and 'refugees' in Polish political discourses depicts a differentiated and hierarchical categorisation of these groups, based on perceived deservingness and proximity.

Given the tense relations between the EU and the Polish government on diverse topics, we also investigated how the EU is discursively referred to in official political addresses. Our analysis thus demonstrates that the EU occupies an important place in the discussion on migration. Official discourses on the migration situation in Poland have indeed been the occasion to insist on Poland's place in the EU. Both in 2016 and 2022, Poland's commitment to its membership in the EU is reaffirmed, through respectively supporting the EU–Turkey deal and protecting the EU's external borders. This rhetoric is quite instrumental in understanding the benefits that EU membership brings to Poland. In 2016, PM Szydło stressed the gain in security that the deal with Turkey would bring to the EU and to the country. In 2022, President Duda instead focused on the potential protection that the EU would provide to Poland should the situation at the EU–Belarusian border or that with Russia worsen.

The comparison we have made thus allows for a better understanding of the linguistic, argumentative and contextual aspects of the contemporary discourse on migration and on the EU in Poland. The racialised aspect of exclusion at the EU's external border, notably pointed out by Stachowitsch and Sachseder (2019), was also observable. Discourses on migration deserve to be further investigated, notably through a postcolonial theoretical approach, in order to disentangle the power relations that exist in the context of the growing militarisation of the Polish border.

Notes

1. As a convention, when used without single quotation marks, the word migrant is employed in this research as a generic word to define non-EU individuals moving to Poland. The choice of this term is made without presumption regarding the legal status of the people on the move.
2. All material collected has been transcribed by the authors. All translations of analysed data from Polish to English are by the authors, the original versions of which are provided in endnotes.
3. '*Polski rząd mówi bardzo jasno i wyraźnie, że chcemy, żeby problemy migrantów były rozwiązywane poza granicami Unii Europejskiej*' (Szydło).
4. '*Dla mnie niezwykle ważna rozmowa z Ojcem Świętym, Franciszkiem, któremu podziękowałem za opiekę duchową, za modlitwę za nasz kraj, za Polskę, za Polaków, bo ta modlitwa trwa nieustannie za Ukrainę i za naród ukraiński w tej niezwykle trudnej chwili, za potępienie wojny*' (Duda).
5. '*No i niezwykle ważny także dla nas, Polaków, ostatni akcent obecności na terenie Watykanu*' (Duda).
6. '*Ilu i w jakich odstępach czasu tych uchodźców może* [Polska] *przyjmować?*' (journalist Marcin Czapski from TVP).
7. '*Dla (...) tych osób*' (Szydło).
8. '*Określenia, jakie osoby mogłyby do Polski przyjechać*' (Szydło).
9. '*Takie osoby, które do Polski chciałyby przyjechać*' (Szydło).
10. '*Będziemy na pewno postępowali tak jak do tej pory, bardzo ostrożnie, przede wszystkim koncentrując się na bezpieczeństwie polskich obywateli*' (Szydło).
11. '*Tak jak powiedziałem uciekają ludzie bardzo bogaci i uciekają również ludzie gorzej sytuowani, uciekają ludzie, którzy mają duży majątek, uciekają ludzie, którzy nic nie zdołali ze swoich domów*

zabrać, bo uciekali dosłownie przed bombami i to A tam mieliśmy do czynienia z migrantami, którzy przylatywani na Białoruś samolotami, było ich stać na bilety lotnicze' (Duda).

12. '*Przyjeżdżają do nas też ludzie z Ukrainy, którzy są bardzo zamożni, mieszkają w Polsce w hotelach, które sami sobie finansują, przyjeżdżają luksusowymi samochodami a też są uchodźcami*' (Duda).
13. '*To wpisuje się oczywiście w oczekiwania Polski, która od momentu, kiedy myśmy objęli rząd w Polsce, polski rząd, mówi bardzo jasno i wyraźnie, że chcemy, żeby problemy migrantów były rozwiązywane poza granicami Unii Europejskiej*' (Szydło).
14. '*Celem tego porozumienia jest przede wszystkim powstrzymanie fali nielegalnych migrantów, którzy napływali do Europy*' (Szydło).
15. '*U nas opowiadam Ojcu Świętemu, jak przyjmujemy uchodźców, których nazywamy naszymi gośćmi z Ukrainy, bo to są nasi sąsiedzi, którzy znaleźli się w niezwykle trudnej sytuacji, którzy uciekają przed wojną, przed śmiercią, przed bombami rosyjskimi, które spadają na ich domy, którym staramy się, ze wszystkich naszych sił i możliwości udzielić pomocy*' (Duda).
16. '*Ludzie z Ukrainy, którzy są bardzo zamożni, (...) też są uchodźcami, też musieli uciekać, bo też ich domy bardzo często w miastach ukraińskich, w luksusowych dzielnicach dzisiaj są narażone na zburzenie, dzisiaj są narażeni na śmierć tak jak wszyscy inni*' (Duda).
17. '*Chcemy budować dobre relacje pomiędzy Polską a Komisją Europejską, Parlamentem Europejskim*' (Szydło).
18. '*Jesteśmy członkiem Unii Europejskiej, jesteśmy członkiem tych instytucji, to zależy nam na dobrym klimacie i na tym, żebyśmy polskie sprawy załatwiali w domu, a nie tutaj na zewnątrz*' (Szydło).
19. '*Z politykami Platformy, którzy tutaj bardzo intensywnie wczoraj pracowali nad tym, żeby dyskredytować w oczach opinii europejskiej Polskę*' (Szydło).
20. '*spełnia wszystkie oczekiwania Polski*' (Szydło).
21. '*Jest szansa na to, żeby ten europejski kryzys migracyjny rozwiązać*' (Szydło).
22. '*Że przede wszystkim musimy tworzyć warunki bezpieczne dla polskich obywateli, bezpieczne również dla ewentualnie tych osób, które chciałyby przyjechać do Polski*' (Szydło).
23. '*Chcemy mieć prawo dokonywania wyboru, określenia, jakie osoby mogłyby do Polski przyjechać*' (Szydło).
24. '*czy są uchodźcy serii A i serii B?*' (journalist to Duda).
25. '*Tak z jednej strony, proszę zamknąć granicę, proszę strzec granicy, z drugiej strony, proszę otworzyć granicę natychmiast wpuścić tych wszystkich ludzi, my będziemy im pomagać, my zaoferujemy im nasze domy, my zaoferujemy naszą pomoc, (...). Dlaczego? Dlatego że każdy widzi, jaka jest ta różnica. I każdy rozumie, że przybysze z Ukrainy, nasi goście z Ukrainy, uchodźcy z Ukrainy wymagają dzisiaj pomocy. Każdy z nas mógłby się znaleźć w takiej sytuacji, a ktoś, kto w Unii Europejskiej szuka lepszego życia, bardzo często żył w swoim kraju w bardzo przyzwoitych warunkach, ale nie wiem, uważał, że socjal bardzo dobry jest i nie trzeba będzie w Unii Europejskiej pracować, tylko będzie się dostawało pieniądze od rządów na zachodzie Europy za nic, no nie! Polacy doskonale rozumieją, że każdy, kto chce żyć normalnie, powinien ciężko pracować*' (Duda).
26. '*Lepsze życie w Unii Europejskiej, w niemieckiej Republice Federalnej i w innych krajach na zachodzie Europy*' (Duda).
27. '*Nielegalnie ją przekraczając, w związku z powyższym my po prostu realizowaliśmy nasze obowiązki wynikające z członkostwa w Unii Europejskiej, wynikające z członkostwa w NATO, mając, chcę podkreślić, mając absolutne poparcie, absolutnej większości polskiego społeczeństwa w obronie tej granicy*' (Duda).

Conflict of interest statement

No conflict of interest was reported by the authors.

ORCID IDs

Claire Laurent https://orcid.org/0009-0007-9321-2393
Elodie Thevenin https://orcid.org/0000-0002-6880-6911

References

Abdelaaty L. (2021). *Discrimination and Delegation: Explaining State Responses to Refugees*. Oxford: Oxford University Press.

Abdelaaty L. (2022). European Countries Are Welcoming Ukrainian Refugees. It Was a Different Story in 2015. *The Washington Post*, 23 March. https://www.washingtonpost.com/politics/2022/03/23/ukraine-refugees-welcome-europe/ (accessed 23 January 2024).

Abdelaaty L., Hamlin R. (2022). Introduction: The Politics of the Migrant/Refugee Binary. *Journal of Immigrant & Refugee Studies* 20(2): 233–239.

Amossy R. (2016). *L'Argumentation dans le Discours*. Paris: Armand Colin.

Amossy R. (2000). *L'Argumentation dans le Discours. Discours Politique, Littérature d'Idées, Fiction*. Paris: Nathan.

Apostolova R. (2015). Of Refugees and Migrants: Stigma, Politics, and Boundary Work at the Borders of Europe. *American Sociological Association Newsletter*, 14 September. https://asaculturesection.org/2015/09/14/of-refugees-and-migrants-stigma-politics-and-boundary-work-at-the-borders-of-europe/ (accessed 10 February 2024).

Baker P., Gabrielatos C., KhosraviNik M., Krzyżanowski M., McEnery T., Wodak R. (2008). A Useful Methodological Synergy? Combining Critical Discourse Analysis and Corpus Linguistics to Examine Discourses of Refugees and Asylum Seekers in the UK Press. *Discourse & Society* 19(3): 273–306.

Balicki J. (2022). Migration Crisis on the Polish–Belarusian Border (2021–2022) from a Humanitarian and Human Rights Perspective. *Studia Europejskie – Studies in European Affairs* 26(2): 75–87.

Bates D. (2023). 'The Jobs All Go to Foreigners': A Critical Discourse Analysis of the Labour Party's 'Left-Wing' Case for Immigration Controls. *Critical Discourse Studies* 20(2): 183–199.

Bennett S. (2018). New 'Crises', Old Habits: Online Interdiscursivity and Intertextuality in UK Migration Policy Discourses. *Journal of Immigrant & Refugee Studies* 16(1–2): 140–160.

Bigo D. (2002). Security and Immigration: Toward a Critique of the Governmentality of Unease. *Alternatives* 27(1, Special Issue): 63–92.

Bodnar A., Grzelak A. (2023). The Polish–Belarusian Border Crisis and the (Lack of) European Union Response. *Białostockie Studia Prawnicze* 28(1): 57–86.

Boomgaarden H.G., Vliegenthart R. (2009). How News Content Influences Anti-Immigration Attitudes: Germany, 1993–2005. *European Journal of Political Research* 48(4): 516–542.

Calabrese L. (2018). Faut-il Dire Migrant ou Réfugié? Débat Lexico-Sémantique autour d'un Problème Public. *Languages* 210(2): 105–124.

Centre National de Ressources Textuelles et Lexicales (2012a). *Définition de 'Migrant'*. https://www.cnrtl.fr/definition/MIGRANT (accessed 10 April 2023).

Centre National de Ressources Textuelles et Lexicales (2012b). *Définition de 'Réfugié'*. https://www.cnrtl.fr/definition/r%C3%A9fugi%C3%A9 (accessed 10 February 2024).

Charaudeau P. (2005). *Le Discours Politique: Les Masques du Pouvoir*. Paris: Vuibert.

Charteris-Black J. (2006). Britain as a Container: Immigration Metaphors in the 2005 Election Campaign. *Discourse & Society* 17(5): 563–581.

Collyer M., de Haas H. (2012). Developing Dynamic Categorisations of Transit Migration. *Population, Space and Place* 18(4): 468–481.

Consilium (2023). *EU Restrictive Measures against Belarus*, 27 February (last reviewed). https://www.consilium.europa.eu/en/policies/sanctions/restrictive-measures-against-belarus/ (accessed 10 February 2024).

Crawley H. (2016). Managing the Unmanageable? Understanding Europe's Response to the Migration 'Crisis'. *Human Geography* 9(2): 13–23.

Crawley H., Skleparis D. (2018). Refugees, Migrants, Neither, Both: Categorical Fetishism and the Politics of Bounding in Europe's 'Migration Crisis'. *Journal of Ethnic and Migration Studies* 44(1): 48–64.

Csehi R., Zgut E. (2021). 'We Won't Let Brussels Dictate Us': Eurosceptic Populism in Hungary and Poland. *European Politics and Society* 22(1): 53–68.

d'Haenens L., de Lange M. (2001). Framing of Asylum Seekers in Dutch Regional Newspapers. *Media, Culture & Society* 23(6): 847–860.

De Coninck D. (2022). The Refugee Paradox During Wartime in Europe: How Ukrainian and Afghan Refugees are (not) Alike. *International Migration Review* 57(2): 578–586.

Dobry M. (2009). *Sociologie des Crises Politiques: La Dynamique des Mobilisations Multisectorielles*. Paris: Presses de Sciences Po.

Eberl J.-M., Meltzer C.E., Heidenreich T., Herrero B., Theorin N., Lind F., Berganza R., Boomgaarden H.G., Schemer C., Strömbäck J. (2018). The European Media Discourse on Immigration and its Effects: A Literature Review. *Annals of the International Communication Association* 42(3): 207–223.

Ekström M. (2007). *Occupying the Floor in Political Press Conferences: A Study on Interaction and Territorial Power*, paper delivered at the ICA's annual conference, San Francisco, 24–28 May.

El Refaie E. (2001). Metaphors We Discriminate by: Naturalized Themes in Austrian Newspaper Articles about Asylum Seekers. *Journal of Sociolinguistics* 5(3): 352–371.

Filipec O. (2022). Multilevel Analysis of the 2021 Poland–Belarus Border Crisis in the Context of Hybrid Threats. *Central European Journal of Politics* 8(1): 1–18.

Frelak J.S. (2017). Solidarity in European Migration Policy: The Perspective of the Visegrád States, in: A. Grimmel, S. My Giang (eds), *Solidarity in the European Union: A Fundamental Value in Crisis*, pp. 81–95. Cham: Springer.

Góra M., Mach Z., Styczyńska N. (2022). Poland and Russia: Turbulent Relations and No Rapprochement in Sight, in: M. Kaeding, J. Pollak, P. Schmidt (eds), *Russia and the Future of Europe: Views from the Capitals*, pp. 79–83. New York: Springer.

Greussing E., Boomgaarden H.G. (2017). Shifting the Refugee Narrative? An Automated Frame Analysis of Europe's 2015 Refugee Crisis. *Journal of Ethnic and Migration Studies* 43(11): 1749–1774.

Grześkowiak M. (2023). The 'Guardian of the Treaties' Is No More? The European Commission and the 2021 Humanitarian Crisis on Poland–Belarus Border. *Refugee Survey Quarterly* 42(1): 81–102.

Guild E., Costello C., Moreno-Lax V. (2017). *Implementation of the 2015 Council Decisions Establishing Provisional Measures in the Area of International Protection for the Benefit of Italy and of Greece*. Center for European Policy Studies. https://www.ceps.eu/ceps-publications/implementation-2015-council-decisions-establishing-provisional-measures-area/ (accessed 10 February 2024).

Halemba A. (2022). Ethnographic Snapshot. Europe in the Woods: Reflections on the Situation at the Polish–Belarusian Border. *Ethnologia Europaea* 52(1): 1–13.

Hamlin R. (2021). *Crossing: How We Label and React to People on the Move*. Stanford: Stanford University Press.

Hébert L. (2001). *Introduction à la Sémantique des Textes*. Paris: Champion.

Holmes S.M., Castañeda H. (2016). Representing the 'European Refugee Crisis' in Germany and Beyond: Deservingness and Difference, Life and Death. *American Ethnologist* 43(1): 12–24.

Horsti K. (2008). Hope and Despair: Representation of Europe and Africa in News Coverage of 'Migration Crisis'. *Communication Studies* 3: 125–156.

Hutter S., Kriesi H. (2022). Politicising Immigration in Times of Crisis. *Journal of Ethnic and Migration Studies* 48(2): 341–365.

Huysmans J. (2006). *The Politics of Insecurity: Fear, Migration and Asylum in the EU*. London: Routledge.

Kancelaria Premiera (2016). *Konferencja Prasowa Premier Beaty Szydło po Szczyczie Rady Europejskiej*, 18 March. https://www.youtube.com/watch?v=k7j2xet8hdk (accessed 10 February 2024).

Karakiewicz-Krawczyk K., Zdziarski K., Landowski M., Nieradko-Heluszko A., Kotwas A., Szumilas P., Knyszyńska A., Karakiewicz B. (2022). The Opinions of Poles about the Need to Provide Humanitarian Aid to Refugees from the Area Covered by the Russian–Ukrainian War. *International Journal of Environmental Research and Public Health* 19(20): Article 20.

Kerbrat-Orecchioni C. (2017). *Les Débats de l'Entre-Deux-Tours des Elections Présidentielles Françaises*. Paris: L'Harmattan.

Kirtsoglou E., Tsimouris G. (2018). Migration, Crisis, Liberalism: The Cultural and Racial Politics of Islamophobia and 'Radical Alterity' in Modern Greece. *Ethnic and Racial Studies* 41(10): 1874–1892.

Krieg-Planque A. (2017). *Analyser les Discours Institutionnels*. Malakoff: Armand Colin.

Krotofil J., Motak D. (2018). A Critical Discourse Analysis of the Media Coverage of the Migration Crisis in Poland. *Scripta Instituti Donneriani Aboensis* 28: 92–115.

Krzyżanowska N., Krzyżanowski M. (2018). 'Crisis' and Migration in Poland: Discursive Shifts, Anti-Pluralism and the Politicisation of Exclusion. *Sociology* 52(3): 612–618.

Krzyżanowski M. (2018). Discursive Shifts in Ethno-Nationalist Politics: On Politicization and Mediatization of the 'Refugee Crisis' in Poland. *Journal of Immigrant and Refugee Studies* 16(1–2): 76–96.

Krzyżanowski M. (2020). Discursive Shifts and the Normalisation of Racism: Imaginaries of Immigration, Moral Panics and the Discourse of Contemporary Right-Wing Populism. *Social Semiotics* 30(4): 503–527.

Krzyżanowski M., Triandafyllidou A., Wodak R. (2018). The Mediatization and the Politicization of the 'Refugee Crisis' in Europe. *Journal of Immigrant & Refugee Studies* 16(1–2): 1–14.

Léonard S., Kaunert C. (2022). The Securitisation of Migration in the European Union: Frontex and Its Evolving Security Practices. *Journal of Ethnic and Migration Studies* 48(6): 1417–1429.

Mach Z., Styczyńska N. (2021). Poland: Economic Enthusiasts, Value Adversaries, in: M. Kaeding, J. Pollak, P. Schmidt (eds), *Euroscepticism and the Future of Europe*, pp. 115–118. Cham: Palgrave Macmillan.

Milioni D.L., Doudaki V., Tsiligiannis P.G., Papa V., Vadratsikas K. (2015). Conflict as News and News as Conflict: A Multidimensional Content Analysis of TV News in Cyprus. *International Journal of Communication* 9(1): 752–772.

Ministerstwo Spraw Wewnętrznych i Administracji (2021). *Konferencja Prasowa S. Żaryn, M. Kamiński*, 27 September. https://www.gov.pl/web/mswia/sluzby-ustalily-ze-wsrod-zatrzymanych-migrantow-sa-osoby-niebezpieczne (accessed 10 February 2024).

Moberg A. (2020). When the Return of the Nation-State Undermines the Rule of Law: Poland, the EU, and Article 7 TEU, in: A. Bakardjieva Engelbrekt, K. Leijon, A. Michalski, L. Oxelheim (eds), *The European Union and the Return of the Nation State: Interdisciplinary European Studies*, pp. 59–82. Cham: Springer.

Paynter E. (2022). Border Crises and Migrant Deservingness: How the Refugee/Economic Migrant Binary Racializes Asylum and Affects Migrants' Navigation of Reception. *Journal of Immigrant & Refugee Studies* 20(2): 293–306.

Pech L., Scheppele K.L. (2017). Illiberalism Within: Rule of Law Backsliding in the EU. *Cambridge Yearbook of European Legal Studies* 19: 3–47.

Perelman C., Olbrechts-Tyteca L. (2008). *Traité de l'Argumentation*. Brussels: Editions de l'Université de Bruxelles.

Permoser J.M. (2017). Redefining Membership: Restrictive Rights and Categorisation in European Union Migration Policy. *Journal of Ethnic and Migration Studies* 43(15): 2536–2555.

Pędziwiatr K. (2019). *The New Polish Migration Policy – False Start*. OpenDemocracy, 19 August. https://www.opendemocracy.net/en/can-europe-make-it/the-new-polish-migration-policy-false-start/?fbclid=IwAR2UWXbbRChGMyA43nYb5n2GzrE6TEPGS69fGyxxcv2vHU2mHo2_45QWRoQ (accessed 10 February 2024).

Pietrusińska M. (2022). 'People From the Forest': Discourse About Migrants in the Narratives of NGO Workers and Activists Involved in the Humanitarian Crisis at the Polish-Belarusian Border. *Sprawy Narodowościowe* 54: Article 2803.

Prezydent RP Andrzej Duda (2022). *Wypowiedź Prezydenta po Audiencji u Papieża Franciszka*, 1 April. https://www.youtube.com/watch?v=K6nnfIyySLY (accessed 10 February 2024).

Rastier F. (2011). *La Mesure et le Grain : Sémantique de Corpus*. Paris: Champion.

Reisigl M., Wodak R. (2001). *Discourse and Discrimination. Rhetorics of Racism and Antisemitism.* London: Routledge.

Rheindorf M., Wodak R. (2020). *Sociolinguistic Perspectives on Migration Control: Language Policy, Identity and Belonging*. *Language, Mobility and Institutions*. Bristol: Multilingual Matters.

Rzepnikowska A. (2023). Racialisation of Polish Migrants in the UK and in Spain (Catalonia). *Journal of Ethnic and Migration Studies* 49(6): 1517–1533.

Sacks H. (1972). On the Analyzability of Stories by Children, in: J.J. Gumperz, D. Hymes (eds), *Directions in Sociolinguistics: The Ethnography of Communication*, pp. 325–345. New York: Rinehart & Winston.

Sacks H. (1995). *Lectures on Conversation*. Volumes I and II, G. Jefferson (ed.), with introduction by E.A. Schegloff. Oxford: Blackwell.

Soyaltin-Colella D. (2022). The EU's 'Actions-Without-Sanctions'? The Politics of the Rule of Law Crisis in Many Europes. *European Politics and Society* 23(1): 25–41.

Stachowitsch S., Sachseder J. (2019). The Gendered and Racialized Politics of Risk Analysis. The Case of Frontex. *Critical Studies on Security* 7(2): 107–123.

Takle M. (2017). Is the Migration Crisis a Solidarity Crisis? In: A. Grimmel (ed.), *The Crisis of the European Union*, pp. 116–129. London: Routledge.

Tazzioli M., Walters W. (2016). The Sight of Migration: Governmentality, Visibility and Europe's Contested Borders. *Global Society* 30(3): 445–464.

Thevenin E. (2021). Between Human Rights and Security Concerns: Politicisation of EU–Turkey and EU–Libya Agreements on Migration in National Parliaments. *European Security* 30(3): 464–484.

Thevenin E. (2022). Protecting Europe Against Migration: Law and Justice's Populist Discourse in the Polish Parliament, in: H. Dajč, I. Jarić, L. Dobrovšak (eds), *Contemporary Populism and Its Political*

Consequences: Discourses and Practices in Central and South-Eastern Europe, pp. 289–306. Zagreb: Institute of Social Sciences Ivo Pilar.

Triandafyllidou A. (2006). Nations, Migrants, and Transnational Identifications: An Interactive Approach to Nationalism, in: G. Delanty, K. Kumar (eds), *The Sage Handbook of Nations and Nationalism*, pp. 285–294. London: Sage.

Triandafyllidou A., Kouki H. (2013). Muslim Immigrants and the Greek Nation: The Emergence of Nationalist Intolerance. *Ethnicities* 13(6): 709–728.

UNHCR (2015). *Refugee vs Migrant: Which Is Right and Why It Matters*. https://www.unrefugees.org/news/refugee-or-migrant-which-is-right/ (accessed 10 February 2024).

UNHCR (2023). *Ukraine Emergency*. https://www.unhcr.org/ukraine-emergency.html (accessed 10 February 2024).

van Dijk T.A. (2018). Discourse and Migration, in: R. Zapata-Barrero, E. Yalaz (eds), *Qualitative Research in European Migration Studies*, pp. 227–245. Cham: Springer.

van Leeuwen T., Wodak R. (1999). Legitimizing Immigration Control: A Discourse-Historical Analysis. *Discourse Studies* 1(1): 83–118.

Wodak R. (2011). 'Us' and 'Them': Inclusion and Exclusion – Discrimination via Discourse, in: G. Delanty, R. Wodak, P. Jones (eds), *Identity, Belonging and Migration*, pp. 54–77. Liverpool: Liverpool University Press.

Wodak R. (2015). The Discursive Construction of Strangers: Analyzing Discourses about Migrants and Migration from a Discourse-Historical Perspective, in: Migration and Citizenship. *Newsletter of the American Political Science Association, Organized Section on Migration and Citizenship*: 6–10.

Wodak R. (2017). 'Strangers in Europe': A Discourse-Historical Approach to the Legitimation of Immigration Control 2015/16, in: S. Zhao, E. Djonov, A. Björkvall, M. Boeriis (eds), *Advancing Multimodal and Critical Discourse Studies: Interdisciplinary Research Inspired by Theo Van Leeuwen's Social Semiotics*, pp. 31–49. New York: Routledge.

Wodak R. (2020). The Language of Walls: Inclusion, Exclusion, and the Racialization of Space, in: J. Solomos (ed.), *Routledge International Handbook of Contemporary Racisms*, pp. 160–177. London: Routledge.

Wodak R., Boukala S. (2015a). European Identities and the Revival of Nationalism in the European Union: A Discourse Historical Approach. *Journal of Language and Politics* 14(1): 87–109.

Wodak R., Boukala S. (2015b). (Supra)National Identity and Language: Rethinking National and European Migration Policies and the Linguistic Integration of Migrants. *Annual Review of Applied Linguistics* 35: 253–273.

Zawadzka-Paluektau N. (2022). Ukrainian Refugees in Polish Press. *Discourse & Communication* 17(1): 96–111.

How to cite this article: Laurent C., Thevenin E. (2024). Discursive Approaches to the Reception of Non-EU Migrants in Polish Official Political Discourse. *Central and Eastern European Migration Review* 13(1): 69–88.

Central and Eastern European Migration Review
Received: 23 February 2023, Accepted: 8 December 2023
Published online: 4 June 2024
Vol. 13, No. 1, 2024, pp. 89–107
doi: 10.54667/ceemr.2024.08

‘Keep Europe for the Europeans’. The Role of Threat Perceptions and Intergroup Contact for Explaining Attitudes towards Immigrants in Hungary

Michèlle Bal*, Eszter Aradi**, Mara A. Yerkes*

In 2015, the inflow of immigrants to Europe increased dramatically. More than 1 million people fled from wars and conflicts in Syria, Iraq and Afghanistan, particularly affecting transit countries along the Western Balkan route. Of all the transit countries, the Hungarian government was particularly vocal in its negative attitude towards immigrants, launching several anti-immigration campaigns which had a detrimental effect on residents’ hostility towards these immigrants. In this study, we focus on the mechanisms behind this increased hostility in a transit-country context by combining insights from integrated-threat theory and contact theory. We find that perceptions of realistic and symbolic threat increased negative attitudes towards immigrants. Importantly, these threat perceptions were shaped by people’s positions in society and personal circumstances, in combination with their contact with immigrants. Specifically, in the harsh and negative Hungarian context, contact negatively influenced threat perceptions, especially amongst people who were at risk of experiencing negative consequences supposedly caused by the influx of immigrants. This in-depth country case study emphasises the importance of contextualising research findings on attitudes towards immigration in a broader social and political context.

Keywords: attitudes towards immigrants, Hungary, realistic threat, symbolic threat, intergroup contact, socio-demographic variables

* Interdisciplinary Social Science, Utrecht University, the Netherlands. Address for correspondence: m.bal@uu.nl.
** Engame Academy, Budapest, Hungary.

Introduction

In 2015, Europe experienced the greatest migration and refugee inflow since the Second World War. War and conflict in Syria, Afghanistan and Iraq, in particular, led to a significant increase in the number of forcibly displaced people. According to the United Nations High Commissioner for Refugees (UNHCR), more than one million people reached Europe by sea in 2015, when the refugee crisis was at its peak (Metcalfe-Hough 2015).[1] Following their arrival in Southern Europe, most migrants attempted to reach Western Europe through the so-called Western Balkans route. As a consequence, countries located along this route are often the most exposed to this mass immigration.

Despite a significant body of literature on attitudes towards immigrants (Davidov and Semyonov 2017; see, e.g., Ceobanu and Escandell 2010), we are just beginning to understand what this exposure to a mass influx of refugees means for attitudes towards immigration in those countries most exposed to these inflows. We already know that a blatant dehumanisation of Muslim refugees and hostile attitudes towards immigrants are particularly high in Central and Eastern European countries, where contact with refugees is low and political elites support an anti-refugee rhetoric (Bruneau, Kteily and Laustsen 2018). Large-scale European studies on attitudes towards immigrants, such as those based on European Social Survey (ESS) data, further suggest that these generally more hostile attitudes towards immigrants in Eastern European countries, combined with period effects such as the influx of refugees in 2015, can lead to a significant increase in negative attitudes towards immigrants (Heizmann and Huth 2021; Schmidt 2021).

Nevertheless, the mechanisms behind country-specific increases in negative attitudes are less clear, particularly in Central and Eastern European countries most affected by the 2015 refugee crisis. In the current study, we aim to investigate these mechanisms, focusing on perceptions of realistic and symbolic threat and intergroup contact in Hungary, a key transit country in 2015. Perceived threat, whether realistic (e.g., immigrants will steal our jobs) or symbolic (e.g., immigrants will take away our traditions) has long been recognised as a key driver of attitudes towards immigrants (Callens and Meuleman 2017; Ceobanu and Escandell 2010; Davidov and Semyonov 2017; Kende, Hadarics and Szabó 2019). Within the context of the 2015 migration crisis, experimental evidence suggests that anti-immigration attitudes are likely to lead to an increase in perceived threat, either realistic or symbolic (Schmuck and Matthes 2015). Conversely, however, the influx of immigrants can also facilitate intergroup contact, thereby reducing intergroup prejudice (Schlueter and Wagner 2008). It is thus crucial to investigate the relationship between perceived threat, intergroup contact and attitudes towards immigrants in the transit countries in light of the recent crisis. We provide, here, an empirical contribution by investigating these mechanisms in the Hungarian case, focusing on how perceptions of realistic and symbolic threat and intergroup contact are related to attitudes toward immigrants within this specific country context. Few studies have looked closely at attitudes towards immigrants in Hungary during this time, despite the country's strong anti-immigrant government campaign, with exceptions focused on glorification and attachment (Kende *et al.* 2019), anti-Muslim sentiment (Goździak and Márton 2018) and political-party preferences (Barna and Koltai 2019). We further contribute to the rich literature on attitudes towards immigrants by studying this important transit country, considering how key socio-demographic characteristics shape both perceptions of threat and, subsequently, attitudes towards immigrants. Specifically, using a mix of linear regression and ANOVA models on representative Hungarian data, we quantitatively study how perceptions of realistic and symbolic threat and intergroup contact are related to attitudes toward immigrants within Hungary as well as how socio-demographic characteristics shape these threat perceptions and, subsequently, attitudes toward immigrants.

Perceptions of threat and contact with immigrants

A wealth of studies have shown that negative attitudes toward immigration are fuelled by perceptions of threat (e.g., Callens and Meuleman 2017; Kuntz, Davidov, Schwartz and Schmidt 2015; Meuleman, Abts, Schmidt, Pettigrew and Davidov 2020). According to integrated-threat theory (Stephan and Stephan 2000; Stephan, Ybarra, and Bachman 1999), a distinction should be made between perceptions of *realistic* threat and perceptions of *symbolic* threat. Realistic threat perceptions are based on expectations that immigrants negatively impact on the physical or material well-being and political and economic power of the people in the host country (e.g., taking their jobs), whereas symbolic threat perceptions concern differences in worldviews between immigrants and host-country residents (i.e., in morals, values, norms, standards, beliefs and attitudes, such as threatening Hungarian culture – Stephan *et al.* 1999).

Research has shown that both types of threat perception contribute to negative attitudes toward immigrants. Not all studies conducted up to now explicitly distinguish between these 2 different types (e.g., Meuleman *et al.* 2020), while some focus on realistic threat (Hercowitz-Amir, Raijman and Davidov 2017; Kuntz, Davidov and Semyonov 2017) or on symbolic threat specifically (Davidov, Seddig, Gorodzeisky, Raijman, Schmidt and Semyonov 2020). When both types of threat perception are taken into account, the results are largely mixed, with realistic threat perceptions being a stronger contributor to some attitude indices and symbolic threat being more important for other indicators of negative attitudes (e.g., Callens and Meuleman 2017; Hellwig and Sinno 2017; Landmann, Gaschler and Rohmann 2019; Meltzer, Ebrl, Theorin, Lind, Schemer, Boomgaarden, Strömbäck and Heidenreich 2018). However, that both realistic and symbolic threat perceptions increase negative attitudes toward immigrants is indisputable.

While many studies have focused on the contribution of threat perceptions to negative attitudes towards immigrants, a few have tried to identify the conditions under which these threat perceptions arise or increase. Recent studies suggest that the sudden influx of migrants during the 2015 refugee crisis may have led to a convergence of realistic and symbolic threat, dependent on the policy context (de Coninck, Solano, Joris, Meuleman and d'Haenens 2021). Cross-national research on threat perceptions suggests, however, that the relative importance of realistic and symbolic threat perceptions is dependent upon the country context. Bell *et al*. (2022) show, for example, that – prior to the 2015 refugee crisis – particularly racist attitudes in Hungary were related to symbolic threat perceptions; realistic threat perceptions played no role. In comparison, realistic threat perceptions played a limited role in Poland and the Czech Republic.

It could also be that some people are more prone than others to experiencing threat when confronted with immigrants, due to their position in society or personal circumstances. The role of socio-demographic variables in shaping perceptions of realistic and symbolic threat has been understudied up to now (however, see Czymara 2020; Meuleman, Abts, Slootmaeckers and Meeusen 2019 for exceptions) although some insights have been revealed in studies focusing on anti-immigrant attitudes that included socio-demographic variables. For instance, employment status and educational level have been shown to contribute to anti-immigrant attitudes, such that people who are unemployed and those who have a lower educational level showed greater anti-immigrant attitudes (Marfouk 2019; Meuleman *et al.* 2019). Conservative political affiliation and mistrust in EU government has also been shown to predict more-negative attitudes towards immigrants, particularly during demographic shifts (Czymara 2020) although, in Hungary, mistrust in the EU appears to be more important for explaining racist attitudes than political trust (Bell *et al.* 2022). While it may be assumed that threat perceptions and anti-immigrant attitudes are positively related, the former were not directly measured in these studies. Other studies have included socio-demographic variables in their models but only looked at the indirect effects of these variables on threat perceptions (Meuleman *et al.* 2020).

In addition to threat perceptions being an important determinant for negative attitudes toward immigrants, intergroup contact is also an often-studied factor in research and theories on prejudice against minority groups. Based on seminal work on the effects of contact between members of different social groups and the subsequent introduction of intergroup-contact theory (Pettigrew 1998), ample studies have established that contact between members of minority and majority groups can lessen negative intergroup attitudes by reducing intergroup anxiety and feelings of threat and increasing empathy and perspective-taking (Pettigrew and Tropp 2006; for overviews, see Pettigrew, Tropp, Wagner and Christ 2011). Whether contact has a positive or a negative effect on intergroup attitudes is, however, dependent on the conditions under which contact is made (i.e., the equal status of the groups in the situation, having common goals, intergroup cooperation and authority support).

Previous studies on attitudes towards immigrants, in particular, have shown that positive contact decreases negative attitudes towards immigrants and negative contact contributes to negative attitudes (e.g., Laurence and Bentley 2018; Meleady, Seger and Vermue 2017; Neumann and Moy 2018). When looking at the conditions facilitating positive contact, most studies have focused on authority support (e.g., Green, Visintin, Sarrasin and Hewstone 2020; Panichella and Ambrosini 2018). Specifically, these studies have shown that direct contact with immigrants decreases negative attitudes towards immigrants (especially among more-highly educated individuals). In contrast, confrontations with immigrants through the mass media can increase hostility, especially among less-educated individuals (Panichella and Ambrosini 2018). Moreover, in countries with more-inclusive integration policies or institutional norms, positive contact with immigrants was facilitated and it more strongly reduced symbolic threat perceptions (Green *et al.* 2020) or helped to facilitate positive change in intergroup attitudes in contact-based interventions (Kende, Tropp and Lantos 2017). Mass-media reporting and integration policy measures could both be viewed as indicators of authority support.

Although most studies have focused on the conditions under which positive intergroup contact can be established, more recently studies have also looked into the factors contributing to negative intergroup contact (Aberson 2015; Barlow, Paolini, Pedersen, Hornsey, Radke, Harwood, Rubin and Sibley 2012; Graf, Paolini and Rubin 2014; Paolini, Harwood and Rubin 2010; Schäfer, Kauff, Prati, Kros, Lang and Christ 2021). These studies indicate that, whereas positive intergroup contact may be more frequent, negative intergroup contact may have stronger negative effects on intergroup attitudes. Moreover, recent work points to the importance of an individual's prior experience in shaping the effects of contact on attitudes. With the current study, we extend these findings by examining the effects of contact in an environment that is somewhat hostile towards immigrants – the Hungarian case. Schäfer *et al.* (2021) suggest that greater attention is needed for such real-world situations (outside experimental research) in order to understand the effect of contact on attitudes. In the Hungarian context, results from a quasi-experiment have shown that contact with Roma people can reduce prejudice (Kende *et al.* 2017). Results from Bell *et al.* (2022) suggest, in contrast, that contact with someone from a different race or ethnicity increased prejudice in Hungary prior to the refugee crisis.

The case of Hungary

Among the refugee transit countries, Hungary offers a particularly interesting case study in which to investigate attitudes toward immigrants in relation to mass immigration. Note that we focus on attitudes towards *immigration* here, not on refugees specifically, a point to which we return in the discussion. In 2015, over 390,000 migrants crossed the Hungarian borders and more than 177,000 migrants applied for asylum (Simonovits, Bernát, Sik and Szeitl 2016).[2] To put this in perspective, in 2015, Hungary received more asylum applications than in the previous 23 years combined (Juhász and Molnár 2016). Despite the large number of

asylum applications, most migrants only aimed to cross through Hungary on their way to other Western European countries such as Germany or Sweden (Török 2015).

Hungary was not a welcoming transit country, gaining attention for its unprecedented strict actions and inhumane treatment of refugees. As Prime Minister Orbán told the European Commission in 2015, 'We Hungarians would like to keep Europe for the Europeans and we also wish to keep Hungary as a Hungarian country', emphasising the symbolic threat posed by immigration. The negative rhetoric of the Hungarian government about refugees and asylum-seekers continued when, during his speech at the press conference of the European Council in September 2015, Prime Minister Orbán declared that a fence would be built at the Hungarian border to keep immigrants away (European Council 2015). Indeed, in September of that year, the fence was built on the Hungarian–Serbian border and extended to the Hungarian–Croatian border in October 2015, thus forcing refugees on the Western Balkans route to avoid Hungary on their way to Western Europe (Simonovits *et al.* 2016). The presence of the fence at the border led to a significant reduction in the number of asylum-seekers but the government continued its campaign against immigration.

In Hungary, intolerance towards minorities has a longer history (Bell *et al.* 2022; Hárs *et al.* 2009; Juhász, Hunyadi and Zgut 2015; Nyíri 2003). Hungarians overwhelmingly support restrictive immigration policies (Marfouk 2019) and researchers even found that Hungarian respondents were negative in their attitudes towards so-called 'Pirezians', a fictive nationality made up for the purposes of researching attitudes towards minorities (Juhász *et al.* 2015). A study of immigrant attitudes before and after the refugee crisis in Hungary using data from the European Social Survey (ESS) suggests that attitudes towards immigrants worsened following the migration crisis, dependent upon political-party preferences (Barna and Koltai 2019).

Previous research points to the importance of the political and policy context for understanding attitudes towards immigration (Ceobanu and Escandell 2010). Along with building a physical fence, political discourse helped to create anti-immigrant sentiment. Political-elite discourse showed signs of racism and hate speech (Bell *et al.* 2022) and the government emphasised the economic, cultural and security 'threats' posed by immigrants (Bocskor 2018), thus highlighting potential symbolic and realistic threats. Asylum-seekers were framed as economic migrants who were likely to take the jobs of Hungarian people (Bocskor 2018), serving to strengthen perceived realistic threats, grounded in fears about unemployment in a society recovering from the global financial crisis of 2008 but where unemployment was actually lower in 2015 than prior to the crisis (Hungarian Central Statistical Office 2016). Muslim asylum-seekers, in particular, were portrayed as 'raiding' Hungary, posing a threat to Hungarian culture and security (Bocskor 2018; Goździak and Márton 2018), placing emphasis on the symbolic threat posed by immigrants. At the time, the government introduced several interventions aimed at controlling the rights of incoming immigrants and asylum-seekers. Asylum laws enacted in 2015 enabled the authorities to place immigrants in detention for up to 12 months while they awaited the decision about their asylum application. The conditions in these detention centres were widely criticised by human-rights organisations, as they were originally built for criminals (Juhász *et al.* 2015).

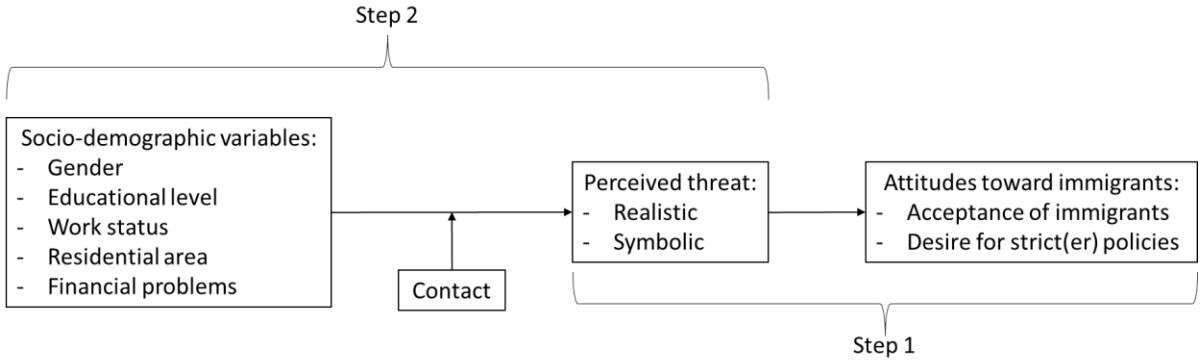
Alongside these measures, in June 2015 the government launched a billboard campaign with anti-immigration messages. Some examples of messages posted nationwide included: 'If you come to Hungary, you can't take the jobs of Hungarian people!' and 'If you come to Hungary, you have to respect our culture!'. Since all messages were in Hungarian, immigrants with no or little knowledge of the Hungarian language could not understand them. Accordingly, it is likely that these messages were targeted towards the Hungarian public rather than immigrants (Nolan 2015). Similarly, in another campaign linked to a referendum to oppose the EU's proposal concerning the mandatory redistribution quota system (Harris 2016), people were exposed to messages such as 'Did you know that, since the beginning of the immigration crisis, the harassment of women has risen sharply in Europe?' and 'Did you know that the Paris terror attacks were carried out by immigrants?' (Gall 2016). Messages like these framed immigration as an economic threat and a threat to national safety and

to Hungarian culture (Bocskor 2018; Cantat and Rajaram 2019; Juhász *et al.* 2015). Even though volunteer organisations and pro-refugee activists challenged the dominant discourse (Kallius, Monterescu and Rajaram 2016) and the analysis of social-media outlets demonstrates the existence of a pro-refugee 'counterpublic' in Hungary (Dessewffy, Nagy and Váry 2017), negative political rhetoric and media campaigns dominated the public discourse about refugees in Hungary. Such anti-immigration campaigns can significantly affect attitudes towards immigrants by increasing perceived realistic and symbolic threats, although the effect of such campaigns can differ based on educational level or acquired knowledge (Dajnoki, Máté, Fenyves and Kun 2017; Schmuck and Matthes 2015).

The current study

The goal of this study is to combine insights from integrated threat theory and intergroup contact theory to better understand the increase in negative attitudes towards immigrants in Hungary during the refugee crisis of 2015. Using data from a representative survey conducted in Hungary at that time, we investigate how perceptions of realistic and symbolic threat and intergroup contact are related to attitudes toward immigrants within this specific context. Moreover, we study how important socio-demographic characteristics shape both perceptions of threat and, subsequently, attitudes towards immigrants (Figure 1).

Figure 1. Schematic overview of the relationships between socio-demographic variables, contact, threat perceptions and negative attitudes towards immigrants



Based on integrated threat theory, we expect that perceptions of realistic and symbolic threat will be negatively related to the acceptance of immigrants and positively related to the call for stricter immigration policies (H1). Moreover, these threat perceptions will be partially shaped by people's position in society and personal circumstances (H2). As not much research has been done on the relationship between socio-demographic characteristics and threat perceptions, we will include gender, educational level, work status, residential area and experience of financial problems in our model and explore their relationships with the two threat perceptions specifically. While no concrete hypotheses can thus be formulated, some exploratory hypotheses can be put forward with regards to both realistic and symbolic threat perceptions. People's position in society and personal circumstances may put some people more at risk of experiencing negative consequences in their physical or material well-being from the influx of immigrants than others (e.g., lower-skilled jobs are more likely to be filled by immigrants than higher-skilled jobs; waiting lists for social housing will possibly increase). As such, a lower educational level, experiencing financial problems or being part of the work force as opposed to being retired may increase realistic threat perceptions (H2a). Furthermore, encountering people with differing worldviews may be more or less likely based on personal circumstances. For instance, living in

an urban area, which is generally more diverse than rural areas, may increase the likelihood of encountering people with different worldviews. As such, symbolic threat perceptions may be higher in a rural residential area than in an urban one (H2b). Finally, based on intergroup contact theory, we expect that these effects will be moderated by whether or not individuals have had previous contact with immigrants, such that negative effects will be heightened with contact, as authority support is low in Hungary, therefore institutional norms are not conducive to positive effects of contact (H3).

Materials and methods

Data, sampling and respondents

We conducted a secondary analysis of data collected by TÁRKI Social Research Institute in October 2015 through face-to-face interviews, with computer-supported questionnaires. TÁRKI frequently collects data about the attitudes of Hungarian society on a variety of issues and the current dataset involves a broad range of questions about attitudes towards immigration.

Multi-staged national probability sampling was applied (Bhattacherjee 2012) and the sample was proportionately stratified, such that each subgroup (stratum) of the population was present in proportion to its size in the population. The final sample was representative of the adult Hungarian population and was weighted by gender, age, educational level and place of residence. It contained 899 respondents between the ages of 18 and 92, of whom 369 were men and 530 were women. The largest group of respondents (52.3 per cent) had finished secondary education, while the second-largest group (34 per cent) had vocational training. More than half of the respondents reported having financial problems (62.7 per cent), while 37.3 per cent reported no financial problems at all. A minority of respondents lived in the capital city of Budapest (18.8 per cent), while 81.2 per cent lived somewhere else in the country. An overview of all descriptive statistics is provided in Table 1.

Table 1. Descriptive statistics

Variable		***M (SD)***	**Range**	***n***
Acceptance of immigrants		2.92 (2.63)	0–8	899
Strictness of immigration policies		4.79 (1.11)	1–6	891
Realistic threat		4.28 (1.33)	1–6	880
Symbolic threat		4.64 (1.19)	1–6	857
		Frequencies	**%**	
Contact	Yes	248	27.6	899
	No	651	72.4	
Gender	Male	369	41.0	899
	Female	530	59.0	
Educational level	Low	470	52.3	899
	Medium	306	34.0	
	High	123	13.7	
Work status	Working age	575	64.5	891
	Retired	316	35.5	
Residential area	Budapest	169	18.8	899
	Not Budapest	730	81.2	
Financial problems	Yes	561	62.7	895
	No	334	37.3	

Note: Sample sizes may differ slightly from weighted samples included in the analyses.

Measures

Although the survey was larger in scope, we only present here those questions relevant for our analysis.

- Attitudes towards immigrants

Attitudes towards immigrants were measured in two ways. First, respondents answered 8 yes/no-questions regarding which types of immigrant should be accepted into their country (i.e., those who flee wars, those who left their countries because of the Islamic State, because of unemployment, because of their political actions, because of their religion or because of their ethnic or national identity, those at risk of starvation or fleeing natural disasters or those arriving for family reunification). To create a continuous measure of acceptance of immigrants, we counted the number of times that respondents answered affirmatively to these questions, meaning that they think that Hungary should accept this type of immigrant. Second, respondents rated the desired strictness of immigration policies by reacting to 3 statements – 'We should protect our borders from immigrants with armed forces'; 'We should directly send those newcomers back who are not eligible for refugee status'; 'Border control should be stricter within the European Union). Answers were measured on a 6-point Likert-scale (1 = totally disagree, 6 = totally agree) and were averaged to create a scale score (α = .66).

- Feelings of realistic and symbolic threat

Feelings of realistic threat were measured on a 6-point Likert-scale (1 = totally disagree, 6 = totally agree) using a combined scale of 3 items ('Due to immigration, the number of crimes committed in Hungary is increasing'; 'Immigrants take jobs from people who were already living here'; 'I am worried that immigrants may spread unknown diseases'; α = .85). Feelings of symbolic threat were measured on a 6-point Likert scale (1 = totally disagree, 6 = totally agree) with a combined scale of 4 items ('I am afraid that the increasing number of immigrants will change our lifestyle in the wrong way'; 'I doubt that Hungary's interests will be a priority to immigrants'; 'I am afraid that, due to the increasing number of immigrants, our culture will vanish'; 'I am afraid that, in the case of war or other political conflict, immigrants will be loyal to their countries of origin'; α = .87).

- Socio-demographic variables and contact

Respondents' gender (male or female), educational level (low/primary education, medium/secondary education, high/tertiary education), work status (whether people were part of the working-age population or retired), residential area (whether people lived in Budapest or not) and whether they experienced financial problems (yes or no) were included in our analyses as our main socio-demographic variables. In addition, contact was measured by asking respondents whether they had met any refugees or immigrants in the past 12 months (yes or no).

Analysis

Multiple linear regression analyses were performed to test how perceptions of realistic and symbolic threat related to both measures of attitudes toward immigrants. All socio-demographic variables and previous contact were included as control variables in these models. Subsequently, ANOVAs were performed to test how the different

socio-demographic variables related to perceptions of both realistic and symbolic threat. Contact and interactions of contact with each of the socio-demographic variables were taken into account in both of these models.

Ethical considerations

None of the authors were involved in the collection of data for this study. Rather, the study relied on secondary data collected by TÁRKI Social Research Institute. The data protection and data security policy of TÁRKI Social Research Institute notes the requirement of obtaining informed consent prior to any processing of data, as well as explaining the voluntary nature of the research to participants (available on the website). This policy underlying data collection ensures that ethical requirements have been met. No separate ethical clearance was obtained for this study from the authors' (research) institutions, as it was neither necessary nor common practice to do so for the use of secondary data collected by a third party at the time of initial analysis (early 2016).

Results

Feelings of threat in relation to attitudes towards immigrants

An overview of the outcomes of the regression analyses can be found in Table 2. Our linear regression analysis showed that the acceptance of immigrants was negatively related to feelings of both realistic threat and symbolic threat. The relationship between symbolic threat and the acceptance of immigrants was slightly stronger than that between realistic threat and the acceptance of immigrants. With regards to the control variables, the acceptance of immigrants was related to educational level, experiencing financial problems and contact, such that people with low education levels (as opposed to those with high education levels), those that experienced financial problems or those that had been in contact with immigrants were less accepting of them.

A second linear regression showed that the desired strictness of immigration policies was positively related to feelings of both realistic and symbolic threat. Again, the relationship between symbolic threat and the desired strictness of immigration policies was slightly stronger than that between realistic threat and the desired strictness of immigration policies. With regards to the control variables, the desired strictness of immigration policies was related to gender, experiencing financial problems and contact, such that men and people who had been in contact with immigrants desired stricter immigration policies. Surprisingly, having financial problems seems to be related to a desire for less strict immigration policies.

Socio-demographic variables and previous contact in relation to feelings of realistic threat

An ANOVA with the five socio-demographic variables (gender, educational level, work status, residential area, financial problems), previous contact and two-way interactions of each socio-demographic variable with contact on realistic threat showed a significant main effect of gender ($F(1, 880) = 12.57$, $p < .01$, $\eta^2_p = .02$) and educational level ($F(2, 880) = 21.18$, $p < .01$, $\eta^2_p = .05$). Men ($M = 4.21$, $SD = 1.29$) experienced somewhat lower levels of realistic threat than women ($M = 4.38$, $SD = 1.35$). Moreover, *post hoc* pairwise comparisons for educational level showed that people with high levels of education ($M = 3{,}70$, $SD = 1.45$) experienced lower levels of realistic threat than people with either medium ($M = 4.37$, $SD = 1.32$; $p < .01$) or low levels of education ($M = 4.47$, $SD = 1.23$; $p < .01$). People with a medium level of education did not differ from those with a lower level ($p > .06$). No other significant main effects for realistic threat were found.

Table 2. Results of the regression analyses for feelings of threat in relation to attitudes towards immigrants

	Acceptance of immigrants				Strictness of immigration policies			
	Step 1		Step 2		Step 1		Step 2	
	B	*β*	*B*	*β*	*B*	*β*	*B*	*β*
Realistic threat	-0.524	-0.265***	-0.473	-0.239***	0.222	0.264***	0.232	0.277***
Symbolic threat	-0.759	-0.343***	-0.721	-0.326***	0.368	0.394***	0.355	0.379***
Education – Middle			0.178	0.031			0.023	0.009
Education – Higher			0.542	0.078*			-0.157	-0.053
Gender			-0.278	-0.052			-0.132	-0.058*
Work status			0.064	0.011			-0.027	-0.011
Residential area			0.243	0.036			0.018	0.007
Financial problems			-0.429	-0.079*			-0.206	-0.089**
Contact			-0.616	-0.105**			0.153	0.062*
R^2	0.329***		0.348***		0.386***		0.406***	
ΔR^2			0.019**				0.020***	

Note: * $p < .05$; ** $p < .01$; *** $p < .001$.

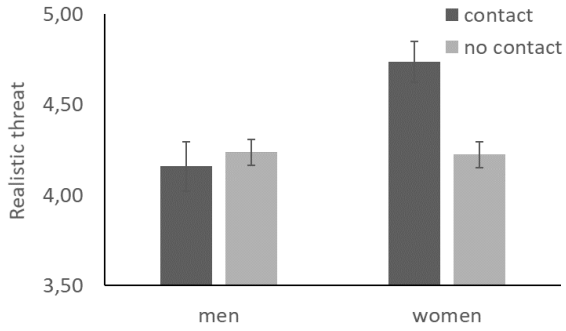
However, looking at the effects moderated by contact, the results showed that the main effect of gender was qualified by an interaction with contact ($F(1, 880) = 10.63$, $p < .01$, $\eta^2_p = .01$). An overview of all significant interactions for realistic threat is presented in Figure 2. Pairwise comparisons showed that, of the people who had previous contact with immigrants, women experienced significantly more realistic threat than men ($F(1, 880) = 16.13$, $p < .01$, $\eta^2_p = .02$). No such effect was found when there was no contact ($p > .78$). Moreover, contact had a significant effect for women ($F(1, 880) = 10.58$, $p < .01$, $\eta^2_p = .01$) but not for men ($p > .59$). Furthermore, work status ($F(1, 880) = 4.48$, $p < .04$, $\eta^2_p = .01$) also showed a significant interaction effect with contact. Pairwise comparisons for the interaction of work status and contact showed that compared to those not having had contact, having contact with immigrants made people experience higher levels of realistic threat only when people were employed ($F(1, 880) = 12.96$, $p < .01$, $\eta^2_p = .02$). All other pairwise comparisons were not significant (ps >.06). Finally, financial problems ($F(1, 880) = 17.22$, $p < .01$, $\eta^2_p = .02$) also interacted with contact. Pairwise comparisons for the interaction of financial problems and contact showed that when people had not had previous contact with immigrants, they experienced significantly more realistic threat when they had financial problems than when they did not ($F(1, 880) = 26.17$, $p < .01$, $\eta^2_p = .03$). Moreover, when people did not experience financial problems, having contact with immigrants led to significantly higher levels of realistic threat than having no contact ($F(1, 880) = 14.71$, $p < .01$, $\eta^2_p = .02$). The other pairwise comparisons were not significant (ps > .11).[3]

Socio-demographic variables and previous contact in relation to feelings of symbolic threat

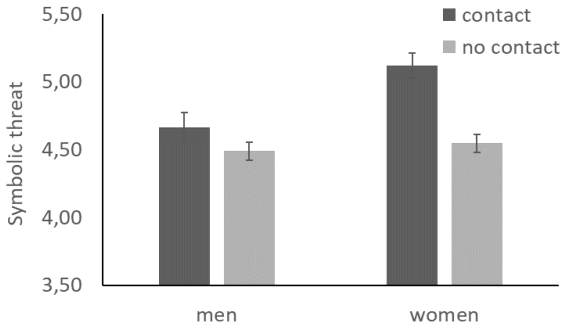
A similar ANOVA with the 5 socio-demographic variables (gender, educational level, work status, residential area, financial problems), previous contact and the two-way interactions of each socio-demographic variable with contact on symbolic threat was also conducted. This ANOVA showed a significant main effect of gender ($F(1, 880) = 10.56$, $p < .01$, $\eta^2_p = .01$), educational level ($F(2, 880) = 16.26$, $p < .01$, $\eta^2_p = .04$) and contact with immigrants ($F(1, 880) = 8.71$, $p < .01$, $\eta^2_p = .01$). Men ($M = 4.54$, $SD = 1.16$) experienced somewhat lower levels of symbolic threat than women ($M = 4.72$, $SD = 1.22$). Moreover, *post hoc* pairwise comparisons for educational level showed that people with high levels of education ($M = 4.17$, $SD = 1.28$) experienced lower levels of symbolic threat than people with medium ($M = 4.79$, $SD = 1.22$; $p < .01$) or low levels of education ($M = 4.70$, $SD = 1.11$; $p < .01$). People with a medium level of education did not differ from those with a lower level ($p > .89$). Finally, people who had previous contact with immigrants ($M = 4.92$, $SD = 1.18$) experienced higher levels of symbolic threat than those who did not ($M = 4.52$, $SD = 1.18$). No other significant main effects for realistic threat were found.

Looking at the effects moderated by contact, the results showed that the main effect of gender was qualified by an interaction with contact ($F(1, 880) = 5.21$, $p < .03$, $\eta^2_p = .01$). An overview of all significant interactions for symbolic threat is also presented in Figure 2. Pairwise comparisons showed that, amongst people who had previous contact with immigrants, women experienced significantly more symbolic threat than men ($F(1, 880) = 10.66$, $p < .01$, $\eta^2_p = .01$). No such effect was found when there was no contact ($p > .36$). Moreover, contact had a significant effect for women ($F(1, 880) = 15.95$, $p < .01$, $\eta^2_p = .02$) but not for men ($p > .26$). Furthermore, financial problems ($F(1, 880) = 10.99$, $p < .01$, $\eta^2_p = .01$) also showed a significant interaction with contact. Pairwise comparisons showed that, when people had not had previous contact with immigrants, they experienced significantly more symbolic threat when they had financial problems as opposed to when they did not ($F(1, 880) = 19.11$, $p < .01$, $\eta^2_p = .02$). Moreover, when they did not experience financial problems, having had contact led to significantly higher levels of symbolic threat than having had no contact ($F(1, 880) = 20.95$, $p < .01$, $\eta^2_p = .02$). The other pairwise comparisons were not significant (ps > .29).

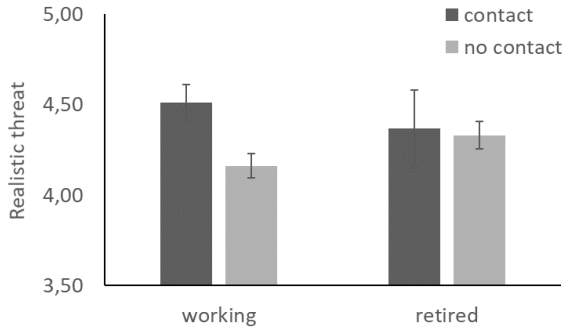
Figure 2. An overview of all significant 2-way interactions of socio-demographic variables with contact for both realistic (left-hand panel) and symbolic (right-hand panel) threat



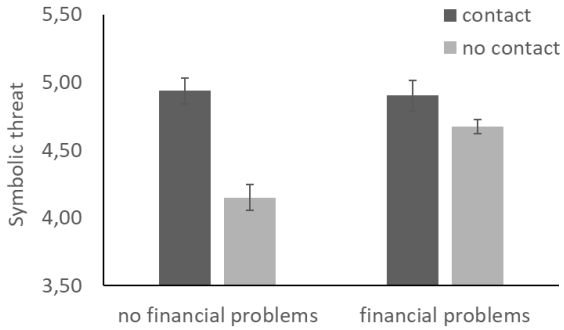
a. Sex by Contact



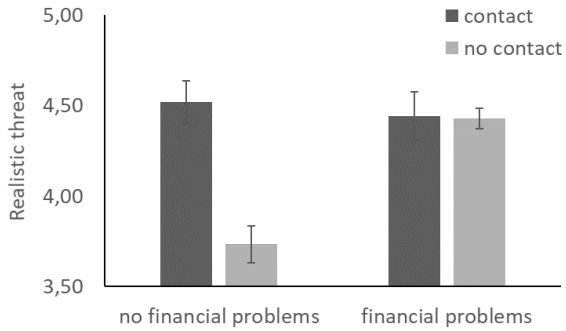
d. Sex by Contact



b. Work status by Contact



e. Financial problems by Contact



c. Financial problems by Contact

Note: Graphs A to C present the significant interactions for realistic threat and graphs D and E for symbolic threat. Error bars represent standard errors.

Discussion

The peak of the refugee crisis in 2015, combined with the hostile political context in Hungary, created an interesting case to study attitudes towards migrants in a transit country greatly impacted on by mass migration flows. The current study explored the mechanisms behind negative attitudes by investigating how threat perceptions, contact and demographic factors all shape the acceptance of immigrants and the desire for

strict(er) policy responses in such a transit country, with its history of negative attitudes towards immigrants. Our results showed that, while both symbolic and realistic threat were significantly related to both attitudinal measures, thus confirming our first hypothesis, symbolic threat perceptions decreased the acceptance of immigrants and increased the desire for strict(er) policy responses slightly more than realistic threat perceptions. Even though political discourse and media campaigns stressed both the symbolic and the realistic threat posed by refugees entering Hungary, overall attitudes towards immigrants were somewhat more affected by symbolic threat perceptions, although both are strongly related to anti-immigrant attitudes. This finding may point to a particular functioning of symbolic and realistic threat perceptions in refugee transit countries compared to European countries on average, where symbolic and realistic threat appears to have temporarily converged as a result of the 2015 migration crisis (De Coninck *et al.* 2021).

Our findings also provide insights into the mechanisms behind attitudes towards immigrants related to socio-demographic differences. Respondents' social position in society matters for their attitudes towards immigrants and their perception of threat. Both attitudinal measures were related to respondents' educational level and whether or not they had experienced financial problems. Being less highly educated and having trouble making ends meet increased negative attitudes towards immigrants. Furthermore, being male also increased the desire for stricter policy measures for immigrants specifically. Moreover, with regard to hypothesis 2, where we explored the relationship between socio-demographic characteristics and perceived threat, respondents' gender and educational level were related to perceptions of both realistic and symbolic threat, such that women and people who were less highly educated experienced greater levels of threat. Residential area did not have any effect on attitudes or threat perceptions. The absence of effects here might be due to the fact that the anti-refugee campaigns by the government impacted on all residents equally or because overall unemployment rates were relatively low in 2015, which may have cancelled out an important difference between urban and rural areas in Hungary.

Although we did not hypothesise a significant relationship between contact and perceived threat and attitudes towards immigrants, we found that contact negatively impacted on both attitudinal measures and also directly increased perceptions of symbolic but not realistic threat. These results indicate the need to study and understand the relationship between perceived threat, contact and attitudes within specific country contexts (e.g., Schäfer *et al.* 2021). One possible explanation for this finding in the Hungarian case is the fact that intergroup contact is more likely to result in positive attitudes when it is supported by the authorities (Green *et al.* 2020; Panichella and Ambrosini 2018). In the Hungarian context, this was most definitely *not* the case. To that end, our findings are in line with Kende *et al.* (2017), who suggest that institutional norms can play an important role in facilitating positive change in intergroup attitudes. A second potential explanation is that, in Hungary, there was not just an absence of support from the authorities, but the Hungarian political context was blatantly hostile, an institutional context which negatively impacted on the possibility of establishing positive contact with immigrants.

In addition to these direct effects and in line with our third hypothesis, contact also moderated the relationships of the demographic variables with threat perceptions. Specifically, the relationships between respondents' gender and their experiencing financial problems with both types of threat perceptions and of work status with realistic threat perceptions, were moderated by contact. It seems that, with regard to gender and work status, contact led to an increase in threat perceptions for groups that could be more vulnerable to experiencing negative effects resulting from the influx of refugees. When women indicated having contact with immigrants, they experienced higher levels of both realistic and symbolic threat as opposed to men. In addition, respondents in the working-age population experienced higher levels of realistic threat in comparison to retired people. With regards to experiencing financial problems, both contact with immigrants and experiencing financial problems seemed to be triggers for experiencing higher threat levels. Not having

financial problems and not having had contact with immigrants were the only factors that reduced threat perceptions compared to all other conditions.

Overall, our analysis showed clear evidence of perceptions of both realistic and symbolic threat negatively influencing attitudes towards immigrants in this refugee transit-country context. Moreover, these threat perceptions were partially shaped by people's position in society and their personal circumstances. People's educational level, work status, experience of financial problems and, in some cases, gender, influenced threat perceptions such that those with a higher risk of experiencing negative consequences by the influx of refugees experienced higher levels of threat. Importantly, except for educational levels, these effects were moderated by having had contact with immigrants and contact also had a direct effect on symbolic threat perceptions. A key contribution to the literature can be taken from these findings on the relationship between demographic variables and threat perceptions.

Moreover, these findings were further nuanced by the moderation effects of contact. In line with Berg (2015), our study confirms that, in studying negative attitudes towards immigrants, it is important to look at these more complex effects and interrelations. In all cases, contact had negative effects, increasing threat perceptions, especially amongst groups portrayed as vulnerable to the effects of the influx of immigrants. These findings counter some existing research, which suggests that an influx of immigrants facilitates intergroup contact, thereby reducing intergroup prejudice (Schlueter and Wagner 2008). They further extend findings on Hungary (e.g., Bell *et al.* 2022; Kende *et al.* 2017) and show the importance of accounting for the country context or other contextual variables necessary for establishing positive contact. In the Hungarian context, with its historically strong intolerance towards minorities (Bell *et al.* 2022; Hárs *et al.* 2009; Juhász *et al.* 2015; Nyíri 2003) and, in particular, the government framing of the 2015 refugee crisis as an economic, cultural and security threat (Bocskor 2018; Goździak and Márton 2018), an environment conducive to establishing positive contact was clearly lacking. Moreover, our findings suggest that, within the Hungarian country context, the potential for negative contact leading to heightened anti-immigrant attitudes is great and not just limited to contact with Roma people, as previously found (e.g., Bell *et al.* 2022; Kende *et al.* 2017). In the challenge of the ongoing refugee crisis, with the continued influx of refugees from outside Europe, such insights are particularly relevant. Further research is needed to better understand the role that demographic characteristics play in these relationships. For example, our findings on the effect of contact specific to women contrasts with pre-2015 Hungarian findings, where women were not more likely to show greater prejudice (Bell *et al.* 2022). Qualitative research on the valence of contact appears promising in this regard, allowing for a more in-depth exploration of different kinds of intergroup contact (e.g., Schäfer *et al*. 2021). Clearly Hungary is a case study where such an in-depth exploration of intergroup contact is needed.

It should be noted that the use of secondary data limited our analyses in some regards. Work status was coded in our study as being either part of the working-age population or being retired. The first category also included currently unemployed people, women on maternity leave and students. As these groups were represented by a limited number of respondents, we decided to opt for the parsimonious division of the working population vs the retired, as this aligns with the idea that some people could more likely experience the effects of the influx of immigrants than others. Moreover, contact was measured with only one item – asking respondents whether they had met any refugees or immigrants in the past 12 months. A more elaborate measure or one focused on refugees specifically, might have enabled us to look more closely at the effects of intergroup contact and the prerequisites for establishing positive contact. Nevertheless, even using just this 1 item, we showed several relevant effects. Furthermore, our measure of desire for strict(er) policy responses had limited reliability ($\alpha = .66$). Excluding one item ('We should protect our borders from immigrants with armed forces') would have increased reliability but, as our measure only consisted of three items and we considered this item to be important, we decided to conduct our analyses using the three-item scale. Future research studying

potential nuanced differences between measuring contact with immigrants versus contact with refugees would be particularly welcome in the Hungarian case, given the explicit and intended conflation of these terms in speeches by Orbán (e.g., Vékony 2016). Finally, histogrammes of our dependent variables showed some deviations from normality and variance was not always equal across groups. Nevertheless, despite not meeting all assumptions perfectly, we feel that the use of regression and ANOVA methods was acceptable to allow for the ease of interpretation they provide and given that ANOVAs are generally seen to be robust to some violations within large datasets.

Despite these limitations, this dataset gave us the unique opportunity to study in-depth both realistic and symbolic threat perceptions, contact and relevant socio-demographic variables related to anti-immigrant attitudes in the context of a highly trafficked transit country during the peak of the 2015 refugee crisis. Closer scrutiny of this context is needed to ascertain the scope of mechanisms such as realistic and symbolic threat for explaining attitudes towards immigrants in a context of mass exposure to immigration. By focusing on mechanisms in this setting, we were able to distinguish realistic threat from symbolic threat and show the varying effects of demographic variables and contact. As such, this study provides interesting avenues for future research. To better understand the relationships between government-led anti-refugee campaigns and the effects of mass influxes of refugees (in transit or otherwise) on perceived threats, more comparative perspectives with greater diversity in relation to government attitudes and/or migration influxes would be useful (Goździak and Márton 2018; see, e.g., Bell *et al.* 2022). In particular, comparative studies that focus on more-elaborate measures of contact in these societal contexts are needed, specifically with refugees. European societies continue to face high influxes of refugees from outside European borders (UNHCR 2023) but transit countries are shifting. Hungary, a key transit country during the 2015 refugee crisis, received just over 35,000 refugees and asylum-seekers in 2022 (UNHCR 2023). Continued scholarly attention is needed to understand the drivers behind the increasingly negative attitudes towards immigrants in these transit countries, in the broader political and policy context.

Notes

1. The number of refugees arriving by sea declined significantly and annually after 2015. Estimates from the UNHCR suggest that 1,032,408 refugees arrived in 2015; 373,652 in 2016; 185,139 in 2017; 141,472 in 2018; and 123,663 in 2019 (as of 21 December 2020; https://data2.unhcr.org/en/situations/mediterranean).
2. The number of migrants applying for asylum has sharply declined since then, although statistics may not offer the full picture. According to the Hungarian Helsinki Committee, an NGO active in the region, the number of push-backs and denials of entrance at the border are much higher (asylumineurope.org). For an interesting ethnographic discussion on the initial presence and later absence of migrants in Hungary and the emerging political solidarities, see (Kallius *et al*. 2016)
3. Conducting similar ANOVAs on the economic and physical components of realistic threat separately yielded largely similar results for both components. For the interaction of contact and work status, the effect only seemed to be driven by feelings of economic threat in particular ($F(1, 826) = 4.87$, $p < .03$, $\eta^2_p = .01$) but not for the feeling of physical threat ($F(1, 826) = 2.76$, $p > .09$).

Conflict of interest statement

No conflict of interest was reported by the authors.

ORCID IDs

Michèlle Bal https://orcid.org/0000-0002-2524-2191
Mara A. Yerkes https://orcid.org/0000-0002-5480-4878

References

Aberson C. (2015). Positive Intergroup Contact, Negative Intergroup Contact, and Threat as Predictors of Cognitive and Affective Dimensions of Prejudice. *Group Processes and Intergroup Relations* 18(6): 743–760.

Barlow F., Paolini S., Pedersen A., Hornsey M., Radke H., Harwood J., Rubin M., Sibley C. (2012). The Contact Caveat: Negative Contact Predicts Increased Prejudice More Than Positive Contact Predicts Reduced Prejudice. *Personality and Social Psychology Bulletin* 38(12): 1629–1643.

Barna I., Koltai J. (2019). Attitude Changes Towards Immigrants in the Turbulent Years of the 'Migrant Crisis' and Anti-Immigrant Campaign in Hungary. *Intersections: East European Journal of Society and Politics* 5(1): 48–70.

Bell D., Strabac Z., Valenta M. (2022). The Importance of Skin Colour in Central Eastern Europe: A Comparative Analysis of Racist Attitudes in Hungary, Poland and the Czech Republic. *Central and Eastern European Migration Review* 11(1): 5–22.

Berg J. (2015). Explaining Attitudes Toward Immigrants and Immigration Policy: A Review of the Theoretical Literature. *Sociology Compass* 9(1): 23–34.

Bhattacherjee A. (2012). *Social Science Research: Principles, Methods, and Practices*. Tampa: University of South Florida.

Bocskor Á. (2018). Anti-Immigration Discourses in Hungary During the 'Crisis' Year: The Orbán Government's 'National Consultation' Campaign of 2015. *Sociology* 52(3): 551–568.

Bruneau E., Kteily N., Laustsen L. (2018). The Unique Effects of Blatant Dehumanization on Attitudes and Behavior Towards Muslim Refugees during the European 'Refugee Crisis' across Four Countries. *European Journal of Social Psychology* 48(5): 645–662.

Callens M., Meuleman B. (2017). Do Integration Policies Relate to Economic and Cultural Threat Perceptions? A Comparative Study in Europe. *International Journal of Comparative Sociology* 58(5): 367–391.

Cantat C., Rajaram P. (2019). The Politics of the Refugee Crisis in Hungary. Bordering and Ordering the Nation and Its Others, in: C. Menjívar, M. Ruiz, I. Ness (eds), *The Oxford Handbook of Migration Crises*, pp. 181–196. Oxford: Oxford University Press.

Ceobanu A., Escandell X. (2010). Comparative Analyses of Public Attitudes Toward Immigrants and Immigration Using Multinational Survey Data: A Review of Theories and Research. *Annual Review of Sociology* 36(1): 309–328.

Czymara C. (2020). Attitudes Toward Refugees in Contemporary Europe: A Longitudinal Perspective on Cross-National Differences. *Social Forces* 99(3): 1306–1333.

Dajnoki K., Máté D., Fenyves V., Kun A. (2017). Deconstructing Attitudes Towards Immigrant Workers Among Hungarian Employees and Higher Education Students. *Sustainability* 9(9): 1639.

Davidov E., Semyonov M. (2017). Attitudes Toward Immigrants in European Societies. *International Journal of Comparative Sociology* 58(5): 359–366.

Davidov E., Seddig D., Gorodzeisky A., Raijman R., Schmidt P., Semyonov M. (2020). Direct and Indirect Predictors of Opposition to Immigration in Europe: Individual Values, Cultural Values, and Symbolic Threat. *Journal of Ethnic and Migration Studies* 46(3): 553–573.

De Coninck D., Solano G., Joris W., Meuleman B., d'Haenens L. (2021). Integration Policies and Threat Perceptions Following the European Migration Crisis: New Insights into the Policy-Threat Nexus. *International Journal of Comparative Sociology* 62(4): 253–280.

Dessewffy T., Nagy Z., Váry D. (2017). Where Are Those Better Angels of Our Society? Subaltern Counterpublics in Hungary During the Refugee Crisis. *Bulletin of Science, Technology & Society* 37(2): 112–123.

European Council (2015). Remarks by President Donald Tusk before his meeting with Prime Minister of Hungary Viktor Orbán. *European Council*, 3 September. https://www.consilium.europa.eu/en/press/press-releases/2015/09/03/tusk-meeting-prime-minister-orban/ (accessed 9 February 2024).

Gall L. (2016). Hungary's Xenophobic Anti-Migrant Campaign. *Human Rights Watch*, 13 Septmeber. https://www.hrw.org/news/2016/09/13/hungarys-xenophobic-anti-migrant-campaign (accessed 9 February 2024).

Goździak E., Márton P. (2018). Where the Wild Things Are: Fear of Islam and the Anti-Refugee Rhetoric in Hungary and in Poland. *Central and Eastern European Migration Review* 7(2): 125–151.

Graf S., Paolini S., Rubin M. (2014). Negative Intergroup Contact Is More Influential, but Positive Intergroup Contact Is More Common: Assessing Contact Prominence and Contact Prevalence in Five Central European Countries. *European Journal of Social Psychology* 44(6): 536–547.

Green E., Visintin E., Sarrasin O., Hewstone M. (2020). When Integration Policies Shape the Impact of Intergroup Contact on Threat Perceptions: A Multilevel Study Across 20 European Countries. *Journal of Ethnic and Migration Studies* 46(3): 631–648.

Harris C. (2016). All You Need to Know about Hungary's Refugee Referendum. *Euronews*, 1 October. https://www.euronews.com/2016/10/01/all-you-need-to-know-about-hungary-s-refugee-referendum (accessed 9 February 2024).

Hárs Á., Balogi A., Bernát A., Feischmidt M., Kováts A., Nyíri P., Péteri G., Zakariás I. (2009). *Immigration Countries in Central and Eastern Europe. The Case of Hungary*. Budapest: Centre for Migration and Refugee Studies of the Ethnic and National Minority Studies Institute; Hungarian Academy of Sciences, IDEA Working Papers 12.

Heizmann B., Huth N. (2021). Economic Conditions and Perceptions of Immigrants as an Economic Threat in Europe: Temporal Dynamics and Mediating Processes. *International Journal of Comparative Sociology* 62(1): 56–82.

Hellwig T., Sinno A. (2017). Different Groups, Different Threats: Public Attitudes Towards Immigrants. *Journal of Ethnic and Migration Studies* 43(3): 339–358.

Hercowitz-Amir A., Raijman R., Davidov E. (2017). Host or Hostile? Attitudes Towards Asylum Seekers in Israel and in Denmark. *International Journal of Comparative Sociology* 58(5): 416–439.

Hungarian Central Statistical Office (2016). *Magyarország 2015*. Budapest: Hungarian Central Statistical Office.

Juhász A., Molnár C. (2016). Magyarország Sajátos Helyzete Az Európai Menekültválságban, in: T. Kolosi, I.G. Tóth (eds), *Társadalmi Riport 2016*, pp. 263–285. Budapest: Tárki.

Juhász A., Hunyadi B., Zgut E. (2015). *Focus on Hungary: Refugees, Asylum and Migration*. Prague: Heinrich-Böll-Stiftung. https://www.boell.de/sites/default/files/2015-focus-on-hungary_refugees_asylum_migration.pdf (accessed 9 February 2024).

Kallius A., Monterescu D., Rajaram P. (2016). Immobilizing Mobility: Border Ethnography, Illiberal Democracy, and the Politics of the 'Refugee Crisis' in Hungary. *American Ethnologist* 43(1): 25–37.

Kende A., Tropp L., Lantos N. (2017). Testing a Contact Intervention Based on Intergroup Friendship between Roma and Non-Roma Hungarians: Reducing Bias Through Institutional Support in a Non-Supportive Societal Context. *Journal of Applied Social Psychology* 47(1): 47–55.

Kende A., Hadarics M., Szabó Z. (2019). Inglorious Glorification and Attachment: National and European Identities as Predictors of Anti- and Pro-Immigrant Attitudes. *British Journal of Social Psychology* 58(3): 569–590.

Kuntz A., Davidov E., Schwartz S., Schmidt P. (2015). Human Values, Legal Regulation, and Approval of Homosexuality in Europe: A Cross-Country Comparison. *European Journal of Social Psychology* 45(1): 120–134.

Kuntz A., Davidov D., Semyonov M. (2017). The Dynamic Relations Between Economic Conditions and Anti-Immigrant Sentiment: A Natural Experiment in Times of the European Economic Crisis. *International Journal of Comparative Sociology* 58(5): 392–415.

Landmann H., Gaschler R., Rohmann A. (2019). What Is Threatening about Refugees? Identifying Different Types of Threat and Their Association with Emotional Responses and Attitudes Towards Refugee Migration. *European Journal of Social Psychology* 49(7): 1401–1420.

Laurence J., Bentley L. (2018). Countervailing Contact: Community Ethnic Diversity, Anti-Immigrant Attitudes and Mediating Pathways of Positive and Negative Inter-Ethnic Contact in European Societies. *Social Science Research* 69: 83–110.

Marfouk A. (2019). I'm Neither Racist nor Xenophobic, But: Dissecting European Attitudes Towards a Ban on Muslims' Immigration. *Ethnic and Racial Studies* 42(10): 1747–1765.

Meleady R., Seger C., Vermue M. (2017). Examining the Role of Positive and Negative Intergroup Contact and Anti-Immigrant Prejudice in Brexit. *British Journal of Social Psychology* 56(4): 799–808.

Meltzer C., Ebrl J., Theorin N., Lind F., Schemer C., Strömbäck J., Boomgaarden H., Heidenreich T. (2018). *Perceptions of the Impact of Immigration and Attitudes Towards Free Movement Within the EU: A Cross-National Study*. https://www.reminder-project.eu/wp-content/uploads/2018/04/with-cover_D9.2.pdf (accessed 9 February 2024).

Metcalfe-Hough V. (2015). *The Migration Crisis? Facts, Challenges and Possible Solutions*. London: Overseas Development Institute (ODI), ODI Briefing. http://cdn-odi-production.s3.amazonaws.com/media/documents/9913.pdf (accessed 9 February 2024)

Meuleman B., Abts K., Slootmaeckers K., Meeusen C. (2019). Differentiated Threat and the Genesis of Prejudice: Group-Specific Antecedents of Homonegativity, Islamophobia, Anti-Semitism, and Anti-Immigrant Attitudes. *Social Problems* 66(2): 222–244.

Meuleman B., Abts K., Schmidt P., Pettigrew T., Davidov E. (2020). Economic Conditions, Group Relative Deprivation and Ethnic Threat Perceptions: A Cross-National Perspective. *Journal of Ethnic and Migration Studies* 46(3): 593–611.

Neumann R., Moy P. (2018). You're (Not) Welcome: The Impact of Symbolic Boundaries, Intergroup Contact, and Experiences with Discrimination on Immigration Attitudes. *American Behavioral Scientist* 62(4): 458–477.

Nolan D. (2015). Hungary Government Condemned over Anti-Immigration Drive. *The Guardian*, 2 July. https://www.theguardian.com/world/2015/jul/02/hungary-government-condemned-over-anti-immigration-drive (accessed 9 February 2024).

Nyíri P. (2003). *Xenophobia in Hungary: A Regional Comparison. Systemic Sources and Possible Solutions*. Budapest: Central European University, Center for Policy Studies Working Paper. http://pdc.ceu.hu/archive/00002079/01/eve_xenophobia_polpap.pdf (accessed 9 February 2024).

Orbán V. (2015). *Prime Minister Viktor Orbán's Speech in the European Parliament*. Kormany. https://2015-2019.kormany.hu/en/the-prime-minister/the-prime-minister-s-speeches/prime-minister-viktor-orban-s-speech-in-the-european-parliament (accessed 28 March 2024).

Panichella N., Ambrosini M. (2018). Between Fears, Contacts and Family Dynamics: The Anti-Immigrant Attitudes in Italy. *Journal of International Migration and Integration* 19(2): 391–411.

Paolini S., Harwood J., Rubin M. (2010). Negative Intergroup Contact Makes Group Memberships Salient: Explaining Why Intergroup Conflict Endures. *Personality and Social Psychology Bulletin* 36(12): 1723–1738.

Pettigrew T. (1998). Intergroup Contact Theory. *Annual Review of Psychology* 49: 65–85.

Pettigrew T., Tropp L. (2006). A Meta-Analytic Test of Intergroup Contact Theory. *Journal of Personality and Social Psychology* 90(5): 751–783.

Pettigrew T., Tropp L., Wagner U., Christ O. (2011). Recent Advances in Intergroup Contact Theory. *International Journal of Intercultural Relations* 35(3): 271–280.

Schäfer S., Kauff M., Prati F., Kros M., Lang T., Christ O. (2021). Does Negative Contact Undermine Attempts to Improve Intergroup Relations? Deepening the Understanding of Negative Contact and Its Consequences for Intergroup Contact Research and Interventions. *Journal of Social Issues* 77(1): 197–216.

Schlueter E., Wagner U. (2008). Regional Differences Matter: Examining the Dual Influence of the Regional Size of the Immigrant Population on Derogation of Immigrants in Europe. *International Journal of Comparative Sociology* 49(2–3): 153–173.

Schmidt K. (2021). The Dynamics of Attitudes Toward Immigrants: Cohort Analyses for Western EU Member States. *International Journal of Comparative Sociology* 62(4): 281–310.

Schmuck D., Matthes J. (2015). How Anti-Immigrant Right-Wing Populist Advertisements Affect Young Voters: Symbolic Threats, Economic Threats and the Moderating Role of Education. *Journal of Ethnic and Migration Studies* 41(10): 1577–1599.

Simonovits B., Bernát A., Sik E., Szeitl B. (2016). *The Social Aspects of the 2015 Migration Crisis in Hungary*. Budapest: TÁRKI Social Research Institute Inc.

Stephan W., Stephan C. (eds) (2000). An Integrated Threat Theory of Prejudice, in: S. Oskamp (ed.), *Reducing Prejudice and Discrimination*, pp. 23–45. Mahwah: Lawrence Erlbaum Associates.

Stephan W., Ybarra O., Bachman G. (1999). Prejudice Toward Immigrants. *Journal of Applied Social Psychology* 29(11): 2221–2237.

Török A. (2015). *Az Európába Irányuló és 2015-tóll Felgyorsult Migráció Tényezői, Irányai És Kilátásai. A Magyar Tudományos Akadémia Migrációs Munkacsoportjának Elemzése* [*Factors, Directions and Future Perspectives of the Accelerated Migration – an Analysis by the Migration Workgroup of the Hungarian Academy of Sciences*]. Budapest: Hungarian Academy of Sciences (MTA).

UNHCR (2023). *Refugee Data Finder*. https://www.unhcr.org/refugee-statistics/ (accessed 16 February 2024).

Vékony D. (2016). Refugees as Political Enemy in the Speeches of Viktor Orban. *Studies of Political Science* 21. https://heinonline.org/HOL/Page?handle=hein.journals/stpolsc2016&div=7&g_sent=1&casa_token=&collection=journals# (accessed 9 February 2024).

How to cite this article: Bal M., Aradi E., Yerkes M.A. (2024). 'Keep Europe for the Europeans'. The Role of Threat Perceptions and Intergroup Contact for Explaining Attitudes towards Immigrants in Hungary. *Central and Eastern European Migration Review* 13(1): 89–107.

Central and Eastern European Migration Review
Received: 3 October 2022, Accepted: 9 January 2024
Published online: 19 March 2024
Vol. 13, No. 1, 2024, pp. 109–127
doi: 10.54667/ceemr.2024.02

Global Embeddedness: Situating Migrant Entrepreneurship within an Asymmetrical, Global Context

Richard Girling*

Historically, approaches within the field of migrant entrepreneurship have almost exclusively focused on migration to nation-states in the Global North. Despite more-recent studies extending the scope to migrants' home countries – and even third-country locations – they have nonetheless remained rooted in South–North migratory contexts and, subsequently, have been mainly theorised based on the concept of persistent power imbalances internationally. Indeed, studies of migrant entrepreneurship in reverse (North–South) migratory contexts have exposed a number of assumptions implicit within these approaches. What is needed, therefore, is a theoretical approach which can account for the global asymmetry hitherto overlooked in the field of migrant entrepreneurship. This paper aims to do exactly that, offering the concept of 'global embeddedness', which situates the phenomenon of migrant entrepreneurship within a wider, asymmetrical global environment and, in so doing, provides a way of accounting for variations in migrant entrepreneurship found outside of the Global North.

Keywords: migrant entrepreneurship, ethnic entrepreneurship, transnational entrepreneurship, mixed-embeddedness, global-embeddedness

* University of Amsterdam, the Netherlands. Address for correspondence: richard.girling83@gmail.com.

Introduction

> *By jettisoning methodological nationalism, an orientation that makes the nation-state the unit of analysis, scholars of migration and development are better able to examine differences of power within states and regions and around the globe* (Glick Schiller and Faist 2010: 5).

Over recent decades, migration and social-science scholars have been preoccupied with using the nation-state as the largest unit of analysis, a tendency referred to as 'methodological nationalism' (Glick Schiller 2015; Glick Schiller and Faist 2010; Wallerstein 2004; Weiss 2005; Wimmer and Glick Schiller 2002; Wolf 2010). This has been defined by Glick Schiller and Faist (2010: 28) as 'an ideological orientation that approaches the study of social and historical processes as if they were contained within the borders of individual nation-states'. Despite this, within the niche field of migrant entrepreneurship such an approach has not been fully embraced. Historically, scholars have almost exclusively focused on migration to nation-states in the Global North (Dheer 2018), resulting in many of the leading theories – including disadvantage theory (Clark and Drinkwater 2010; Johnson 2000; Light 1979), ethnic-enclave theory (Light, Sabagh, Bozorgmehr and Der-Martirosian 1994; Portes and Shafer 2007; Wilson and Portes 1980) and the mixed-embeddedness approach (Kloosterman, Van Der Leun and Rath 1999) – being rooted in Western-centric contexts. Despite some authors later extending the scope to include migrants' countries of origin (Brzozowski, Cucculelli and Surdej 2017; Drori, Honig and Wright 2009; Portes, Haller and Guarnizo 2002), these studies have been largely restricted to a methodologically nationalistic (Wimmer and Glick Schiller 2002) binary paradigm of the host and home countries. While even more recent approaches have begun to venture beyond this binary paradigm – for example Solano *et al.*'s (2022) 'multifocality' approach, Elo *et al.*'s (2022) concept of 'transnational diaspora entrepreneurship', as well as revised applications of the term 'transnational entrepreneurship' (Harima 2022; Yamamura and Lassalle 2022) – they remain predominantly rooted in methodologically nationalistic, South–North migratory contexts, leading to a number of assumptions that seldom hold true in contexts outside the Global North. What is needed, therefore, is a theoretical approach that can situate the phenomenon of migrant entrepreneurship within a wider, asymmetrical global environment and, thus, reconcile the variations between studies of migrant entrepreneurship in the Global North and South. This paper aims to do exactly that, offering the concept of 'global embeddedness'. In so doing, it extends scholars' calls for the adoption of a more-global unit of analysis (Glick Schiller and Faist 2010; Wallerstein 2004; Weiss 2005) into the field of migrant entrepreneurship.

In terms of structure, the paper begins with a brief overview of the literature which details the two main points outlined above. First, it shows how theoretical approaches within the field of migrant entrepreneurship have been rooted within South-to-North migratory contexts. Second – and as a direct consequence of the first point – it shows how more-recent studies of migrant entrepreneurship in reverse (North–South) migratory contexts have exposed a number of Western-centric assumptions embedded within these theories.

Finally, in a thesis statement, the paper subsequently proposes a more holistic approach, offering the concept of 'global embeddedness'. This concept is then explained and developed. First, at a theoretical level, it is proposed that migrants, their motivations and their various forms of capital must be situated within a wider, uneven global environment. Second, at an empirical level, evidence and examples are introduced in order to demonstrate such an approach 'in action' and, specifically, how it can be used to reconcile variations and contradictions of migrant entrepreneurship between Global North and South contexts.

Literature review: the problem with the status quo

Western-centric methodological nationalism

Historically, no doubt as a result of most leading migration scholars being located at educational institutions within the Global North, these researchers have understandably tended to focus on the flows of migration happening right in front of their eyes – namely, migration to nation-states in the Global North. This can even be seen from the language they use, whereby – instead of using the term '*migrant* entrepreneur' – they often use '*immigrant* entrepreneur', implicitly revealing a host-country viewpoint. This, when coupled with the fact that most migration to the Global North tends to originate from *the Global South*,[1] has resulted in the overwhelming majority of migrant entrepreneurship studies to date having focused not only on the host-country nation-state as the largest unit of analysis (Bagwell 2018; Chen and Tan 2009) but also being situated within *South-to-North migratory contexts* (Dheer 2018; Ilhan-Nas, Sahin and Cilingir 2011). Importantly, nation-states within the Global North and South are themselves not situated within a flat and even environment but, rather, within an uneven, hierarchical global landscape, whereby those in the Global North find themselves towards the 'top' end and those in the Global South diametrically towards the 'bottom' (Sosnowska 2016, 2017). Theories, then, which have been developed in the context of South-to-North migration may well have been created within 'dominant-subordinate relationships' which can grant 'a certain power relationship in favor of the anthropologist' (Nader 1972: 5). Indeed, by restricting our focus to migration within this direction, many of the current theories and models have been 'theorized largely on the basis of persistent power imbalances in the international system' (Croucher 2009: 479). Subsequently, it is perhaps unsurprising that these theories often seem to make a number of assumptions which reflect this dominant-subordinate context within which they were created, as can be clearly seen in several of the leading theories within the field of migrant entrepreneurship.

First, *disadvantage theory* (Clark and Drinkwater 2010; Johnson 2000; Light 1979) assumes that migrants are often disadvantaged. Faced with barriers to the mainstream labour market, the theory proposes that these migrants are 'pushed' into entrepreneurship for financial survival.

Second, *ethnic enclave theory* (Light *et al*. 1994; Portes and Shafer 2007; Wilson and Portes 1980) assumes that migrants often have access to a plentiful supply of affordable, co-ethnic labour. Here, within the asymmetrical context of Cuban migration to the USA, Wilson and Portes (1980) found that Cuban entrepreneurs had an advantage over native entrepreneurs via their ability to leverage shared social and cultural capital to hire the comparatively affordable co-ethnic labour.

Third, there is the *mixed-embeddedness approach* (Kloosterman *et al*. 1999) which – despite excellent contributions to the field in terms of acknowledging the crucial role played by macro layers of the environment– restricted this environment to the borders of the host country. This is exemplified in Kloosterman and Rath's (2001) paper, wherein they create a typology of the opportunity structure consisting of three levels: 1) neighbourhood; 2) regional/urban; and 3) national. Such a typology, as can be seen, immediately rules out any potential role played by a wider, international environment. Considering the original context in which this theory is rooted – namely, that of Turkish bakers and Moroccan butchers in the Netherlands – it is perhaps unsurprising that these entrepreneurs were observed selling their products exclusively to the economically dominant host country and, as a result, the role of external factors – including the migrants' home countries – was neglected.

Fourth, although more-recent studies of transnational entrepreneurship have extended the concept to include the migrants' home countries (Brzozowski *et al*. 2017; Drori *et al*. 2009; Portes *et al*. 2002) – and even spaces beyond the home- and host-country binary paradigm (for example, Harima 2022; Yamamura and

Lassalle 2022) as well the concepts of multifocality (Solano *et al*. 2022) and transnational-diaspora entrepreneurship (Elo and Servais 2018; Elo *et al*. 2022) – problems with these terms remain,as shown in the 3 points below:

4. They are still often applied in a methodologically nationalistic manner and – although acknowledging transnational communities (Elo, Täube and Servais 2022, for example) – tend to restrict the largest unit of analysis to nation-states.[2]
5. As an extention of Point 1, these theories subsequently neglect the important role played by global asymmetrical power hierarchies.[3]
6. These approaches remain almost invariably rooted within South–North migratory contexts,[4] commonly leading to findings and assumptions rooted in asymmetrical power dynamics.

Transnational-diaspora entrepreneurship, for example, has been described as helping to develop home countries (Elo and Servais 2018) – implying that these countries are less developed than host countries. The two authors also refer to how these entrepreneurs often employ co-ethnic labour, in effect mirroring the assumptions of ethnic-enclave theory which, as outlined above, was itself formulated within Western-centric contexts. Additionally, these approaches tend to assume that migrants are the most likely to sell products or services to the (economically dominant) host country – thus repeating the assumption of the mixed-embeddedness approach, likewise outlined above.

Last but not least, these theories – with the exception of transnational-diaspora entrepreneurship (Elo 2016; Elo and Servais 2018) tend to neglect the role of migrants' *motivations* within migrant entrepreneurship, a trend which is also exemplified by the interactive model (Waldinger, Aldrich and Ward 1990), Chen and Tan's (2009) integrative model of transnational entrepreneurship, and even Solano *et al*.'s model multifocal approach (2022), whereby none of them include the factor of motivation in the diagrams representing their models.[5] So why is this? Such an omittance seems to naturally suggest that migrants' motivations for relocating and starting their own business are not important. Considering that the great majority of people do *not* migrate (*circa* 97 per cent of people globally – UN DESA 2020), nor start their own businesses (*circa* 90 per cent among women and 82 per cent among men in OECD countries – OECD/European Commission 2019), it is worth asking why leading theoreticians often seem to overlook the motivations underlying such exceptional actions (Elo 2016). The answer, once again, relates back to how such theories are rooted in the context of migration from South to North, whereby it is often simply *assumed* that migrants want to migrate to an economically more-developed country and similarly assume that their decision to open their own businesses is likewise rooted in economic considerations. In effect, this reduces migrant entrepreneurs to a kind of 'homo economicus' (Persky 1995), void of their own free will, drawn to economically more-developed countries and entrepreneurship purely for financial gain.

How more-recent studies outside the Global North have exposed asymmetrical assumptions

Indeed, such Western-centric theories and assumptions have been exposed by more-recent studies of migrant entrepreneurship outside of the Global North. Let us start, for example, with the assumption that migrants are disadvantaged. Here, it has been shown that migrants moving in a North–South direction are less likely to be disadvantaged (see, for example, Mombeuil, Fotiadis and Aimable's 2021 study of Haitian migrant entrepreneurs returning to Haiti from the US) and can even constitute the 'economic upper class' (Verver, Passenier and Roessingh 2019). This privilege, rooted in the migrants' Global-North origins, is mirrored in the labels often used to describe them, for example 'descending migrant entrepreneurs' (Harima 2014) – a term that hints at these migrants' supposedly lofty origins. The same is true outside of the migrant-entrepreneurship literature in which – in North–South migratory contexts, such as the study of North Americans who migrated

to South America (Benson and O'Reilly 2018; Dixon, Murray and Gelatt 2006; Hayes 2014) – migrants have been found to be privileged, leading authors to question the often-assumed correlation between migrants and discrimination (Lundstrom 2017).

These studies within developing economies have naturally raised questions about migrant entrepreneurs' motivations and reasons for moving to a *less* economically developed location. Girling (2021), for example, in a study of migrant entrepreneurs who had moved from Global-North locations (such as Germany, the US and the UK) to Poland, found that they were not primarily motivated by economic factors. In other words, migration to economically less-developed regions 'calls into question taken-for-granted understandings of the relationship between migration and economics' (Benson and O'Reilly 2018: 91). Indeed, owing to the migration to poorer regions often being based upon non-economic factors, it has been labeled by some scholars as 'lifestyle migration', whereby migrants relocate to economically less-developed countries for a better climate and/or lifestyle (Andrejuk 2017; Benson and O'Reilly 2018; Ono 2015; Stone and Stubbs 2007; Torkington 2010). Moreover, in such contexts, migrants' motivations for opening their own business also seem to be less about economic incentives. Here, the handful of studies which have been conducted in such contexts have found these motivations to be more about agency and less about financial gain (Selmer, McNulty, Lauring, Vance 2018; Vance and Bergin 2019).

Migration toward economically less-developed regions has also exposed assumptions about the ethnic division of labour of migrant entrepreneurs. Most notably, ethnic-enclave theory (Light *et al*. 1994; Portes and Shafer 2007; Wilson and Portes 1980) attributed the success of many migrant entrepreneurs to their access to a plentiful supply of affordable co-ethnic migrant labour. As outlined above, more recent approaches have continued this assumption – for example, Elo and Servais (2018), the authors of *Transnational Diaspora Entrepreneurship*, have described how migrant entrepreneurs often employ co-ethnic labour. Yet, in North–South migratory contexts, such assumptions are less applicable. To illustrate this, let us turn to Harima's (2014) groundbreaking study of Japanese migrant entrepreneurs running online English-language schools in the Philippines. Here, Harima documented how their employees were Filipino, while their clients were in Japan. In such a context, it seems, there was no plentiful supply of affordable co-ethnic Japanese labour so, instead, they hired the comparatively more plentiful and affordable *native* Filipino labour. Such findings were mirrored in Girling's (2021) study of Global-North migrants in Poland, whereby Global-North labour was found to be more expensive and less plentiful, leading to these migrants being more likely to access native (Polish) labour, which the author then described as a situation which was 'an ethnic economy in reverse' (Girling 2022: 31).

Studies of migrant entrepreneurship outside the Global North have also revealed at least 2 additional economic assumptions implicit in current theoretical approaches. First, they show that it cannot be assumed that the host country is the economically dominant country. As outlined above, the mixed-embeddedness approach – rooted in the context of Turkish and Moroccan migrant entrepreneurs selling products within the economically dominant host country (the Netherlands) – restricted the largest unit of analysis to the host country only.

Yet, we can return once again to the example of Harima's Japanese migrant entrepreneurs in the Philippines who, by contrast, were not selling products or services within the home country but, instead, were selling them to clients in their country of origin. While, on the surface, this seems to lend support to other studies of transnational migrant entrepreneurship, such as Saxenian's (2002) research on Indian, Chinese and Taiwanese entrepreneurs selling products in Silicon Valley, upon closer inspection we see that Harima's entrepreneurs are selling services in a reverse direction – namely, to the home and not the host country. Such variation, however, can be reconciled by the fact that both groups of migrant entrepreneurs share the trait of selling products or services to economically dominant countries.

Second – and as an extention of the first point – it cannot be assumed that the country of origin is less developed. Transnational diaspora entrepreneurship, for example, has been described as helping to develop home countries (Elo and Servais 2018) – implying that home countries are less developed than host countries. Yet, once again returning to Harima's Japanese migrant entrepreneurs in the Philippines, this is simply not the case, as the home country (Japan) is undeniably more economically developed than the host country (the Philippines).

Thesis statement

In light of the above and in order to fully understand all factors at play, this paper argues that a theoretical approach is needed which can situate the phenomenon of migrant entrepreneurship within the wider, asymmetrical global environment and, in so doing, reconcile variations between the findings of studies from both Global-North and Global-South contexts. In an attempt to do so, I offer the following statement:

> Variations surrounding the phenomenon of migrant entrepreneurship can only be understood when situated within a wider, uneven context, wherein migrants, their motivations and their resources, are embedded not only within the host country, home country and third-party countries but also within an asymmetrical, global environment which varies across both space and time. In order to describe this, the term '*global* embeddedness' is proposed.

A multi-layered, uneven global environment

As noted above, recent studies (*inter alia*, Bagwell 2018; Elo 2016; Girling 2021, 2022; Harima 2014) outside the Global North have helped to expose the asymmetry of the global environment. This environment is, however, a tremendously broad and complex entity so, in an attempt to simplify it while still doing justice to its complexity, it will be broken down into a number of distinct yet closely intertwined layers: 1) economic; 2) socio-cultural; 3) politico-institutional; and 4) technological. At this point, it should be noted that this typology is by no means exhaustive[6] but, rather, based upon layers that were observable from the data of a previous study of migrant entrepreneurship (Girling 2021) as well as from other studies cited throughout this paper. These specific layers of the macro environment are now outlined below.

The global economic environment

The idea of an uneven, economic environment is nothing new. How certain cities and regions can be more prosperous than others has been well-documented (Kloosterman and Rath 2001; Scott 1998; Scott and Storper 2003). Yet, within the field of migrant entrepreneurship, this observation has been largely restricted to the uneven economic environment within the host country (Bagwell 2018). In the wider literature, however, scholars have highlighted the uneven economic development not just *within* nation-states but *between* them (Sassen 1991; Wallerstein 2004; Weiss 2005). Within the complex internationalisation of trade and processes, control has become centred within a small number of 'global cities' such as New York, London and Tokyo, while cities in the Global South have arguably benefited from the decentralisation of other parts of the supply chain (Sassen 1991). Such changes demonstrate not only how the economic environment is uneven across space but also how it changes over time (Hoang 2014).

The global socio-cultural environment

Discrimination is inherently only possible within cultural hierarchies which value certain characteristics over others. While this has usually been observed in South-to-North contexts, wherein migrants' ethnicity is negatively interpreted within local host-country cultural hierarchies, this is not always the case. As noted in the literature review, migrants who move in the reverse direction can often benefit from privilege (Andrejuk 2017; Lundstrom 2017). Importantly, such cultural hierarchies appear to stretch beyond the borders of individual nation-states into international contexts, whereby the cultural capital of those from the Global North 'can become transnationally acknowledged' (Weiss 2005: 722).

The global politico-institutional environment

Within the field of migrant entrepreneurship, authors have correctly outlined the important role played by the politico-institutional environment within the host country (Engelen 2001; Kloosterman and Rath 2001; Kloosterman *et al*. 1999). However, this layer of the environment does not stop at the host country's borders. On the contrary, laws originating from outside the host country can impact on migrant entrepreneurs in a variety of ways. First and foremost, migrant entrepreneurs engaged in transnational business face the challenge of dealing with the laws of the countries in which they are conducting business. Second, even migrant entrepreneurs conducting business solely within the host country are still embedded within a wider, global politico-institutional framework. For example, even their very presence in the host country is dependent upon the laws of the latter allowing them to emigrate (a right, of course, which was previously denied to many citizens of countries within the former USSR). Moreover, within EU countries, a great number of their 'national' laws stem from EU regulations. Additionally, we could also consider the international variation in the politico-institutional environment of the *private sector*. For example, the online payment processor, PayPal, allows clients in countries in the Global North to withdraw money into their bank accounts, yet denies the same right to clients in the Global South (Ukraine, for example). This, of course, comes on top of the large number of firms which restrict access to their websites or services based on geofencing, effectively blocking those from certain (often Global South) countries.

The global technological environment

Spatial variations in the global technological environment are, of course, nothing new. Even prior to the industrial revolution in 'the West', regions in the Middle East and Asia had previously been technologically more advanced (Arrighi, Hamashita and Selden 1996; Lewis 1995). In today's world, variations persist and can be quickly illustrated through indicators such as variation in the structure of a country's economy, as well as the number of patents filed. In terms of the former, economies in the Global North usually have a higher percentage of people employed in high-skilled tertiary sectors (World Bank 2019). In the Netherlands, for example, approximately 82 per cent of the Dutch workforce in 2019 was in the tertiary sector (World Bank 2021a). In Niger, by contrast, this figure stood at just 21 per cent (World Bank 2021b). In terms of the number of patents filed, staying with the same nation-states as examples, in the Netherlands there were 9,253 patent applications (WIPO 2021a), compared to just 153 in Niger (WIPO 2021b). According to Burawoy (2001: 150), such spatial variations in the global technological landscape are representative of a 'hierarchical chain' at a technological level.

Situating migrant entrepreneurship within the multi-layered, uneven global environment: global embeddedness

To truly understand all processes involved in migrant entrepreneurship, the phenomenon must be situated not just within the host- and home-country environment but also within the wider (economic, technological, socio-cultural, politico-institutional) uneven global environment outlined above. To describe the positioning of migrant entrepreneurship within this macro-level global environment, the term 'global embeddedness' is proposed. By using this term, the aim is to capture several important implications. First, migrant entrepreneurs operate within an environment extending well-beyond the borders of the host, the home and even third-party countries, as these countries themselves are situated within a broader, asymmetrical global environment. Second, this environment is hierarchical, with some nation-states situated toward the top and others towards the bottom, although it can also vary within nation-states and change over time. Third, migrants' resources can be shaped by their position within this asymmetrical global environment. Fourth – and finally – despite this global environment influencing migrants and their resources, it is not strictly 'top down', as migrants do have an element of agency, albeit often actively consuming and reproducing such structures (Burawoy 2001).

As noted previously, although more-recent approaches have extended the field of migrant entrepreneurship beyond the binary paradigm of host and home countries (Elo *et al*. 2022; Harima 2022; Solano *et al*. 2022; Yamamura and Lassalle 2022), they have done so within South–North migratory contexts, often retaining nation-states as the largest units of analysis and largely neglecting the role of the wider, asymmetrical, global environment. A global-embeddedness approach, however, calls instead for a consideration of how migrants (and their motivations and resources) are embedded not only within host, home and third-party countries but also within the wider, asymmetrical, global environment. As such, the concept of global embeddedness echoes scholars' calls for the adoption of a more global unit of analysis (Centeno, Chase-Dunn, Chorev, Grell-Brisk, Inoue, Larcey, Reyes and Surak 2020; Glick Schiller and Faist 2010; Wallerstein 1987; 2004; Weiss 2005) and extends it into the field of migrant entrepreneurship, while also – importantly – foregrounding the important role played by uneven power hierarchies. Such an extension, as can be seen in Figure 1, constitutes the 'next stage' of an ongoing expansion over time of the size of the unit of analysis.

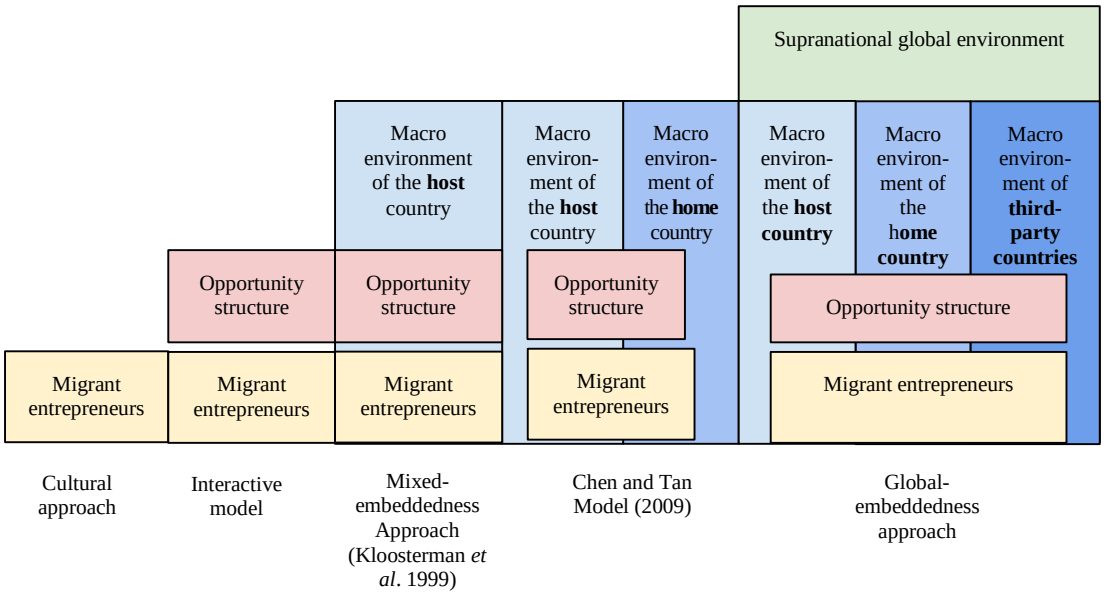
In using the term global embeddedness, three 'push backs' are anticipated. First, such global theories have previously been criticised for trying to be a 'grand narrative' (Glick Schiller and Faist 2010). However, positioning migrant entrepreneurs within this global environment is the only way to truly incorporate all factors at play. Not doing so would mean not understanding the full picture.

Second, one may ask why a new concept is required, instead of simply extending or expanding upon one of the many pre-existing concepts. Why not, for example, expand upon concepts like the mixed-embeddedness approach, transnational-diaspora entrepreneurship or multifocality? These terms, however – as outlined above – have been firmly rooted in South–North migratory contexts, leading to a number of assumptions embedded within them, as well as the all-too-often continuing use of nation-states as the largest unit of analysis. As a result, they lack any connotations of positioning migrants within global hierarchies. 'Global embeddedness', by contrast, immediately foregrounds the importance of the wider, global context, as well as the power dynamics implicit within this.

Third – and this is an extension of the second point – one may ask why a pre-existing concept from outside the migrant entrepreneurship field cannot be used. Why not, for example, borrow from Wallerstein's world-systems analysis (1987, 2004) and extend it to the context of migrant entrepreneurs? Although this was considered, it was decided against for three main reasons. First, the concept has already become loaded with connotations, which may prove unhelpful and distracting in its adaptation to the field of migrant entrepreneurship. Second, it lacks any of the prevailing theoretical infrastructure from within the field, such as migrants' opportunity

structures, ethnic division of labour, etc. Third, unlike world-systems analysis, global embeddedness incorporates a greater consideration of other layers of the macro environment beside the economic one, while also acknowledging the agency of individuals.

Figure 1. Global embeddedness: expanding the unit of analysis to include the role of the wider global environment



Source: The author's own diagram based on an analysis of other models.

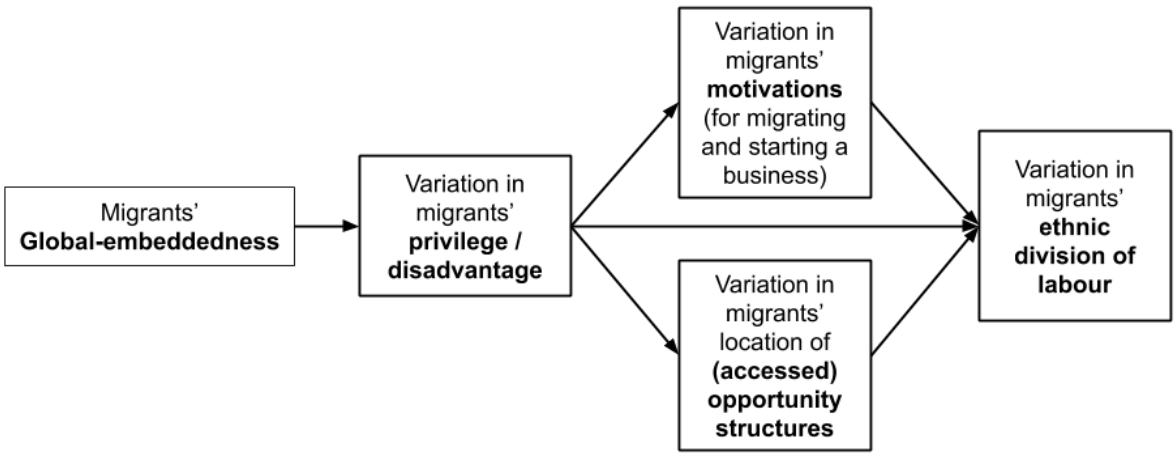
Last of all, two additional aspects should be clarified. First, adopting such a global approach does not mean refraining from using the nation-state unit of analysis altogether (Glick Schiller and Faist 2010). Indeed, as seen from the depiction in Figure 1 of what 'global-embeddedness' encompasses, the terms 'host country', 'home country' and 'third-party countries' are still retained, so this approach is clearly not advocating for a total abandonment of the nation-state as a unit of analysis. On the contrary, it is proposed that, in the same way that cities are not the largest unit of analysis, neither should nation-states be. Instead, it is argued that the largest unit of analysis should be much wider – namely, *global* structures. Second, it should be clarified that global embeddedness is an approach and not a model. By this, I mean that it does not attempt to define or predict how global processes work. Rather, the purpose is to simply acknowledge the important role played by an uneven global environment and to situate the phenomenon of migrant entrepreneurship within it. In so doing, we can better understand the full context within which migrant entrepreneurship takes place.

Discussion: global embeddedness in action

Above, this paper has made the case for adopting a more global approach to the field of migrant entrepreneurship. Only a holistic global approach, it was argued, is capable of accounting for the variations experienced by migrant entrepreneurs around the world. Now, such an approach will be seen 'in action'. Specifically, I demonstrate, below, how adopting a 'global-embeddedness approach' can reconcile variations observed in studies of migrant entrepreneurship in both Global-North and Global-South contexts. Four variations, in particular, will be highlighted: 1) the variation in privilege and disadvantage; 2) the variation in

motivations; 3) the variation in the location of (accessed) opportunity structures; and 4) the variation in the ethnic division of labour. Moreover, it is proposed that these variations are causally related. First of all, migrants' global embeddedness creates variations in the levels of privilege and disadvantage which migrants experience. This, in turn, creates variations in their motivations for migrating and starting a business in the first place, as well as the opportunity structures which they access. Finally, these aforementioned factors contribute to variations in migrants' ethnic division of labour. This relationship is depicted in Figure 2 below.7

Figure 2. The role of migrants' global embeddedness in contributing to variations within migrant entrepreneurship



Variations in disadvantage and privilege

Here, I argue that, by looking through a lobal-embeddedness lens, we can begin to reconcile the privilege–disadvantage dichotomy of migrant entrepreneurship. It can explain, for example, why migrants moving in a South-to-North direction often experience disadvantage (Clark and Drinkwater 2010; Johnson 2000; Light 1979), while those migrating in the other direction often experience the exact opposite, namely, *privilege*. As noted previously, the world is not a flat, level playing field. Migrants operate within a multi-layered (economic, technological, socio-cultural, politico-institutional), uneven environment. It is the variation in the position of the migrants and their resources within this uneven environment which generates variations in privileges. For example, starting with the socio-cultural layer of the macro environment, those from the Global North are, unsurprisingly, more likely to possess higher levels of Global North cultural and social capital. This, when situated within cultural hierarchies, takes on structurally imposed values (Coleman 1988). As a result of this, those possessing Global North cultural capital are granted a relatively higher standing within society, while those with cultural capital from the Global South experience the mirror opposite. This, for example, explains why North American migrants, who relocate to South America, often experience cultural prestige. In such contexts, their language (Andrejuk 2017; Girling 2021) and ethnicity (Fechter 2005) become signifiers of their Global-North origins, subsequently granting them prestige within their new environment.

Such privilege is enhanced by other layers of the global environment. First, in terms of the politico-institutional layer, this often grants those from nation-states within the Global North with powerful passports which give them access to a huge number of countries across the globe. German citizens, for example, have an international buffet of 135 countries to pick from while, for those from Afghanistan, such choice is restricted

to just 30 countries (Passport Index 2021). Second, in terms of the economic layer, migrants from the Global North enjoy a relatively greater purchasing power in the comparatively economically affordable Global South. Third, a technological layer also plays a role. Those from the Global North are statistically more likely to hold down high-skilled tertiary-sector employment – which usually provides higher wages – leading to economic privilege. Moreover, those with technological skills, in addition to Global North cultural capital (in particular Global North languages, such as English) are more likely to be able to find well-paid employment within the current global economy. Fourth, at a natural environment level, migrant entrepreneurs may be affected by their position within the natural world. For example, those in areas of drought and other natural disasters may be at a greater disadvantage although, to a large extent, this can be mediated by technological and economic development (e.g. dams, irrigation, desalination plants etc.).

Acknowledging the nuance

At this point, it should be noted that such a binary distinction between North and South, privileged and disadvantaged is not always so straightforward. There is, of course, also great variation within nation-states. There are some people from the Global South with huge capital reserves and human capital and who are well-connected in terms of social capital. Conversely, there are others from the Global North who have no money and are poorly educated. Moreover, just because someone is born into a Global North country with a statistically higher likelihood of tertiary employment, it does not mean that all tertiary employment is better paid. Here we only need to think of service staff at fast-food restaurants and the wider hospitality industry. Indeed, many of the North Americans in Hayes' (2014) and Benson and O'Reilly's (2018) studies of migration to South America were not previously 'privileged' within their home country. These migrants often lacked financial capital within their comparatively more expensive country of origin, which is one of the main reasons why they consider migrating to an economically more affordable country. In doing so, they perform a kind of 'geoarbitrage' (Hayes 2014), traversing spatial disparities in wealth in order to increase their own relative standing, thus elevating themselves within financial (and socio-cultural) hierarchies. In other words, while we must acknowledge the nuance and complexity of the variation within nation-states, we must likewise acknowledge the presence of a broader, asymmetrical environment within which migrants are clearly embedded.

Variation in motivations

Such variation in privilege plays a dominant role in determining the options for both migrating and starting a business. With regard to the former, these variations in motivation are reflections of 'spatial opportunity differentials' (de Haas 2011: 20) between migrants' locations of origin (and third-party countries) and their host-country environment. Importantly, such spatial-opportunity differentials are themselves often the reflection of an uneven global environment and migrants' subsequent privileged (or disadvantaged) position within it. Once we situate the migrant entrepreneurs within the various layers of this environment, such differing motivations between the two subject groups begin to make sense. Firstly, within the uneven, global economic environment, with wealth concentrated in regions in the Global North, it is perhaps unsurprising that the migrant entrepreneurs who are privileged enough to be born into such economically prosperous regions are less likely to relocate to the Global South for higher earnings. Conversely, for those from the Global South, where their migration to the Global North constitutes a move to an economically more-developed region, it is likewise unsurprising that they seem more likely to do so for higher revenues. Of course, as seen with the North American migrants in Hayes' (2014) study, it is not always that simple, as Global North migrants do sometimes

migrate for economic reasons; however, importantly, this seems more about reducing costs as opposed to increasing earnings.

Second, the uneven, international, politico-institutional environment also plays a role. Owing to its unevenness, it grants particular privileges to certain migrants, while unfairly assigning disadvantages to others. Such privileges or disadvantages then influence migrants' motivations for migrating. For example, migrants from Syria in 2015 were understandably motivated to move to nation-states within the European Union for their comparatively safer environment. For those born into nation-states in the Global North, by contrast, where their home-country environments can also be considered safe, this is obviously less likely to play a role in their motivation for migrating. Further, within such an uneven environment, migrants experience variation in their politico-institutional mobility which is based almost entirely upon their citizenship. For those from countries in the Global North, it is often relatively easy to travel and work around the world. Those from the Global South, however, regularly face legal barriers which curtail their ability to travel and work (Sklair 2012). This highlights how migrants' aspirations can be restricted by their abilities (de Haas 2011) and, importantly, how such abilities are a reflection of migrants' privileged or disadvantaged position within an uneven, internationally uneven, international politico-institutional environment. Third and finally, migrants' position within other layers of the wider global environment may also play a role – notably migrants' position within the wider natural environment and migration stimulated by flooding, droughts and other natural disasters (Ionesco, Mokhnacheva and Gemenne 2016; Renaud, Bogardi, Dun and Warner 2007).

Let us now consider the variation in migrants' motivations for starting their own business. As seen earlier in this paper, for migrant entrepreneurs from the Global North, starting their own business has been found to be less about financial incentives and more about an expression of agency (Selmer *et al*. 2018; Vance and Bergin 2019). Those from the Global South, by contrast, have often been found to do so for financial necessity (Clark and Drinkwater 2010; Johnson 2000; Light 1979). Here, once again, it is argued that migrants' varying levels of global embeddedness and the subsequent variation in their composition of privileges and disadvantages, can serve as a way of understanding such differences. Migrants originating from the Global North are often granted the privilege of finding it easier to secure relatively well-paid positions within the mainstream labour market. It stands to reason, therefore, that, if a migrant already has a well-paid job, they would then be less likely to be motivated to open their own business for financial reasons. Conversely, for those from the Global South, who face more barriers to securing well-paid employment in the mainstream labour market (Grand and Szulkin 2002), it should not come as a surprise that they are more likely to be motivated by the relatively higher earnings offered by an entrepreneurial trajectory. As such, it reveals how motivations themselves seem to reflect broader inequalities in the environment and the embeddedness of migrants and their resources (i.e. their 'global embeddedness') within this environment.

Variation in migrants' location of (accessed) opportunity structures

Earlier in this paper I showed how, in Harima's (2014) study of Japanese migrant entrepreneurs in the Philippines, they sold their services to their home country of Japan, instead of selling them locally in their host country of the Philippines. This, it was shown, is in contrast to Kloosterman and Rath's (2001) restriction of opportunity structures to the host country only, unlike studies of transnational South-to-North migrant entrepreneurs who, despite supplying their businesses internationally from their home countries, have usually been found to still sell their products or services locally within the host country. Here it is proposed, once again, that adopting a global-embeddedness approach enables us to account for such variation. Firstly, by situating migrant entrepreneurs within global economic hierarchies, we can account for *why* migrant entrepreneurs would even *want to* sell products or services to clients in the Global North. Within this uneven

economic landscape, whereby wealth is largely concentrated in nation-states within the Global North, clients there can 'pay more', so there is an *economic incentive* to target them. Likewise, it explains why migrant entrepreneurs have often been found to be reluctant to sell products or services to the Global South (Rusinovic 2008). Second, it provides a mechanism to explain *how* they access such markets. This can be done by situating migrant entrepreneurs within the other layers (technological, socio-cultural and politico-institutional) of the global environment. In terms of the technological environment, certain industries, in particular those in the tertiary sector, lend themselves better to international distribution. As shown previously, migrant entrepreneurs from the Global North are more likely to be located within such industries, which helps to explain *how* they are able to service clients internationally. Harima's migrant entrepreneurs are a good example here, as they are providing English-language lessons, which is a service which can be provided remotely.

Turning now to the role of the socio-cultural layer of the global environment, the acquisition of Global North social and cultural capital can act as a bridge to Global North markets. Unsurprisingly, clients situated in the Global North are more likely to conduct business with people they know and in a language they know. It follows, then, that migrant entrepreneurs from the Global North, who have usually spent much of their lives acquiring these countries' social and cultural capital, are more likely to possess the socio-cultural capital necessary to bridge this gap. Using Harima's Japanese migrant entrepreneurs as an example once again, we see that they possess the Japanese socio-cultural capital necessary to bridge them to clients in Japan. Last but not least, the international politico-institutional layer of the global environment also helps to account for the 'how'. As mentioned previously, the international politico-institutional landscape is *uneven*. While most migrant entrepreneurs from the Global North can travel and conduct business internationally with relative ease, those from the Global South seem to face greater restrictions. This uneven landscape can prevent migrant entrepreneurs from the Global South from moving freely to countries in the Global North,[8] subsequently curtailing their ability to acquire social and cultural capital in these countries and with the end result that they are less likely to be able to 'bridge' the gap between themselves and clients situated in the Global North. Once again using the example of Japan and the Philippines, those from Japan require no visa to visit the Philippines, whereas those from the Philippines wishing to travel to Japan need a visa (Philippines Visa 2021). Migrant entrepreneurs, in other words, owing to their global embeddedness, inherit a specific composition of privileges and/or disadvantages which, in turn, enable or restrict the opportunity structures which they are able to access.

Variation in migrants' ethnic division of labour

Last of all, I propose that migrants' varying global embeddedness, in conjunction with its subsequent shaping of migrants' privileges, motivations and opportunity structures, can account for the differences in migrant entrepreneurs' ethnic division of labour. Returning to the example of Harima's (2014) Japanese migrant entrepreneurs who – in contradiction to ethnic-enclave theory (Light *et al.* 1994; Portes and Shafer 2007; Wilson and Portes 1980) – did not employ co-ethnic Japanese labour as it was neither plentiful nor affordable, we see that, instead, they often opted to hire native, Filipino labour. Why then, in this North-to-South context is co-ethnic labour neither plentiful nor affordable? First, in terms of its availability, an uneven global environment inherently creates 'spatial opportunity differentials' (de Haas 2011: 20) which, as seen above, underlie migrants' motivations for migrating. Such motivations, combined with migrants' varying ability to move to a location of their choosing (i.e. their position within an uneven politico-institutional global environment), have resulted in relatively high numbers of migrants (272 million in 2019) from the Global South migrating to the Global North, with only a small number of migrants (just over 13 million in 2019) migrating in the opposite direction (UN DESA 2020).

Second, turning now to why Global-North labour is less affordable, this can once again be explained by considering migrants' global embeddedness. Within the context of uneven global hierarchies, those who possess Global North cultural capital are often highly desirable within the labour market (Sosnowska 2016, 2017). Girling (2021: 68), for example, recounts the story of a restaurant owner in Wroclaw, Poland, who has to pay a premium to hire an Italian chef, rather than access the comparatively cheaper local pools of Polish – and Ukrainian – labour. This, of course, comes on top of the huge demand within Wroclaw by Western outsourcing operations looking for speakers of Global North languages, in particular English, to service their Global North clientele (Girling 2021). This demand for Global-North labour, combined with its lower supply within the Global South, provides a mechanism for explaining its relatively higher cost.

Conclusion

This paper has argued the case for adopting a more global approach to the field of migrant entrepreneurship. Starting with a literature review, it has shown how, historically, scholars of migrant entrepreneurship have focused almost exclusively upon migration within nation-states in the Global North. Such a Western-centric approach, we have seen, has led to several of the leading theories, including disadvantage theory (Clark and Drinkwater 2010; Johnson 2000; Light 1979), ethnic-enclave theory (Light *et al*. 1994; Portes and Shafer 2007; Wilson and Portes 1980) and a mixed-embeddedness approach, being rooted in Western-centric contexts. Despite recent theories expanding the scope to include migrants' home countries (Brzozowski *et al*. 2017; Drori *et al*., 2009; Portes *et al*. 2002) and even third-party countries (Elo and Servais 2018; Elo *et al*. 2022; Harima 2022; Solano *et al*. 2022; Yamamura and Lassalle 2022), the theories have likewise remained rooted in South–North migratory contexts. As a result of this, they make a number of assumptions which do not always hold true in contexts external to nation-states in the Global North. Indeed, it was then shown how more-recent studies of migrant entrepreneurship outside the Global North demonstrate exactly this, revealing how migrants cannot be assumed to be disadvantaged (Mombeuil *et al*. 2021; Verver *et al*. 2019), how they constitute a supply of affordable labour (Girling and Bamwenda 2018; Harima 2014) or are motivated by the desire to move to an economically more developed region (Benson and O'Reilly 2018; Elo 2016; Girling 2021); nor can the host country be more developed than that of the home country (Girling 2022). Subsequently, in an attempt to take account of global asymmetries, as well as to reconcile variations between studies of migrant entrepreneurship in the Global North and the Global South, the concept of 'global embeddedness' was presented; a concept which proposes that the phenomenon of migrant entrepreneurship can only be fully understood when we first situate migrants and their various forms of capital within a wider and uneven macro environment which extends beyond national borders. The concept was then demonstrated 'in action', showing how it can account for variations in migrant entrepreneurship, specifically: 1) variations in privilege and disadvantage; 2) variations in motivation; 3) variations in the locations of (accessed) opportunity structures; and 4) variations in the ethnic division of labour. In proposing the concept of global embeddedness, the paper extended scholars' calls for adopting a more-global unit of analysis (Glick Schiller and Faist 2010; Wallerstein 2004; Weiss 2005) into the field of migrant entrepreneurship while also – importantly – foregrounding the role played by uneven power hierarchies.

Notes

1. South–North migration flows greatly outweigh North–North ones (UN DESA 2020).
2. For example, Solano *et al*. (2022) discuss the multiple nation-states in which migrant entrepreneurs can be embedded, yet there is no mention of how these nation-states themselves are embedded within a broader, asymmetrical global environment.

3. While the concept of cosmopolitanism within the field of transnational entrepreneurship includes a greater consideration of cultural hierarchies (Figueira, Caselli and Theodorakopoulos 2016), it is once again rooted in South–North migratory contexts, leading to certain assumptions – for example, that migrant entrepreneurs are disadvantaged and lack economic capital.
4. Solano *et al*. (2022), for example, document Moroccan migrant entrepreneuers in the Netherlands, while Elo *et al*. (2020) consider the case (among others) of Jamaican entrepreneurs in the UK. While transnational-diaspora entrepreneurship has, indeed, been applied in contexts outside of the Global North, such as the study of migrant entrepreneurs in Uzbekistan (Elo 2016), it should be noted that these entrepreneurs themselves emigrated from countries even less economically developed than Uzbekistan – i.e. they were still moving in a South–North direction, *per se*.
5. The same is true of Yamamura and Lassalle (2022) as well as Harima (2022).
6. While this typology may be considered underdeveloped and superficial, it serves as an accessible point of entry for an exploratory analysis of how the phenomenon of migrant entrepreneurship interacts within an asymmetrical global context.
7. At this point, it should be acknowledged that Figure 2 almost certainly does not capture all elements of the complicated dynamics involved in migrant entrepreneurship, nor does it aim to predict all behaviour of migrant entrepreneurs. It does, however, provide a point of access where we can begin to understand the embeddedness of migrant entrepreneurs within asymmetrical global hierarchies and the causal effect of this upon their motivations, the location of the opportunity structures they access and their ethnic division of labour. Additionally, while the dichotomy of North vs South is often used to illustrate variations, migrants are – of course – situated within a broad spectrum. While the descriptions may lose some of the nuance that this entails, the primary goal is – as started – to highlight the role played by the wider, asymmetrical environment in which migrant entrepreneurs operate.
8. This restriction of international mobility might also help to explain why, in many studies (for example, Kloosterman *et al*. 1999), South-to-North migrant entrepreneurs seem less likely to access international opportunity structures. After all, once inside a country in the Global North, such a restriction of international mobility might discourage them from further moving around, subsequently encouraging them to focus on business opportunities within the Global North host country.

Conflict of interest statement

No conflict of interest was reported by the author.

ORCID ID

Richard Girling https://orcid.org/0000-0001-6698-1022

References

Andrejuk K. (2017). Self-Employed Migrants from EU Member States in Poland: Differentiated Professional Trajectories and Explanations of Entrepreneurial Success. *Journal of Ethnic and Migration Studies* 43(4): 560–577.

Arrighi G., Hamashita T., Selden M. (1996). *The Rise of East Asia in World Historical Perspective*. Binghamton: State University of New York, Fernand Braudel Center for the Study of Economies, Historical Systems and Civilizations.

Bagwell S. (2018). From Mixed Embeddedness to Transnational Mixed Embeddedness. *International Journal of Entrepreneurial Behavior & Research* 24(1): 104–120.

Benson M., O'Reilly K. (2018). *Lifestyle Migration and Colonial Traces in Malaysia and Panama*. Basingstoke: Palgrave Macmillan.

Brzozowski J., Cucculelli M., Surdej A. (2017). The Determinants of Transnational Entrepreneurship and Transnational Ties' Dynamics Among Immigrant Entrepreneurs in ICT Sector in Italy. *International Migration* 55(3): 105–125.

Burawoy M. (2001). Manufacturing the Global. *Ethnography* 2(2): 147–159.

Centeno M.A., Chase-Dunn C., Chorev N., Grell-Brisk M., Inoue H., Larcey P., Reyes V., Surak K. (2020). For a Global Social Science. *Global Perspectives* 1(1): 116–149.

Chen W., Tan J. (2009). Understanding Transnational Entrepreneurship Through a Network Lens: Theoretical and Methodological Considerations. *Entrepreneurship Theory and Practice* 33(5): 1079–1091.

Clark K., Drinkwater S. (2010). Recent Trends in Minority Ethnic Entrepreneurship in Britain. *International Small Business Journal* 28(2): 136–146.

Coleman J.S. (1988). Social Capital in the Creation of Human Capital. *American Journal of Sociology* 9(4): 95–120.

Croucher S. (2009). Migrants of Privilege: The Political Transnationalism of Americans in Mexico. *Identities: Global Studies in Culture and Power* 16(4): 463–491.

De Haas H. (2011). *The Determinants of International Migration: Conceptualizing Policy, Origin and Destination Effects.* Amsterdam: International Migration Institute, IMI Working Paper No. 32.

Dheer R. (2018). Entrepreneurship by Immigrants: A Review of Existing Literature and Directions for Future Research. *International Entrepreneurship and Management Journal* 14(3): 555–614.

Dixon D., Murray J., Gelatt J. (2006). *America's Emigrants. US Retirement Migration to Mexico and Panama*. Washington: The Migration Policy Institute, New Global Initiatives.

Drori I., Honig B., Wright M. (2009). Transnational Entrepreneurship: An Emergent Field of Study. *Entrepreneurship Theory and Practice* 33(5): 1001–1022.

Elo M. (2016). Typology of Diaspora Entrepreneurship: Case Studies in Uzbekistan. *Journal of International Entrepreneurship* 14(1): 121–155.

Elo M., Minto-Coy I., Silva S.C., Zhang X. (2020). Diaspora Networks in International Marketing: How Do Ethnic Products Diffuse to Foreign Markets? *European Journal of International Management* 14(4): 693–729.

Elo M., Servais P. (2018). Migration Perspective on Entrepreneurship, in: R. Turcan, N. Fraser (eds), *The Palgrave Handbook of Multidisciplinary Perspectives on Entrepreneurship*, pp. 355–386. Cham: Palgrave Macmillan.

Elo M., Täube F.A., Servais P. (2022). Who Is Doing 'Transnational Diaspora Entrepreneurship'? Understanding Formal Identity and Status. *Journal of World Business* 57(1): 101240.

Engelen E. (2001). 'Breaking In' and 'Breaking Out': A Weberian Approach to Entrepreneurial Opportunities. *Journal of Ethnic and Migration Studies* 27(2): 203–223.

Fechter A.M. (2005). The 'Other' Stares Back: Experiencing Whiteness in Jakarta. *Ethnography* 6(1): 87–103.

Figueira C., Caselli G., Theodorakopoulos N. (2016). Migrant Entrepreneurs as Cosmopolitan Change Agents: A Bourdieuan Perspective on Capital Accumulation. *Society and Business Review* 11(3): 297–312.

Girling R.A. (2021). *Studying 'Up' in Migrant Entrepreneurship: Privileged Migrant Entrepreneurs in Wroclaw*. Amsterdam: Amsterdam Institute for Social Science Research, Faculty of Social and Behavioural Sciences.

Girling R.A. (2022). Privileged Core-State Migrant Entrepreneurs in Poland: An Ethnic Economy in Reverse? *International Journal of Entrepreneurial Behavior & Research* 28(9): 31–51.

Girling R.A., Bamwenda E. (2018). The Emerging Trend of 'Expat-Preneurs': A Headache for the Pre-existing Ethnic Entrepreneur Theories. *Sosyoekonomi* 26(38): 207–219.

Glick Schiller N. (2015). Explanatory Frameworks in Transnational Migration Studies: The Missing Multi-Scalar Global Perspective. *Ethnic and Racial Studies* 38(13): 2275–2282.

Glick Schiller N., Faist T. (eds) (2010). *Migration, Development, and Transnationalization: A Critical Stance*. Oxford, New York: Berghahn.

Grand C.L., Szulkin R. (2002). Permanent Disadvantage or Gradual Integration: Explaining the Immigrant–Native Earnings Gap in Sweden. *Labour* 16(1): 37–64.

Harima A. (2014). Network Dynamics of Descending Diaspora Entrepreneurship: Multiple Case Studies with Japanese Entrepreneurs in Emerging Economies. *Journal of Entrepreneurship, Management and Innovation* 10(4): 65–92.

Harima A. (2022). Transnational Migration Entrepreneurship During a Crisis: Immediate Response to Challenges and Opportunities Emerging Through the COVID-19 Pandemic. *Business and Society Review* 127(S1): 223–251.

Hayes M. (2014). 'We Gained a Lot Over What We Would Have Had': The Geographic Arbitrage of North American Lifestyle Migrants to Cuenca, Ecuador. *Journal of Ethnic and Migration Studies* 40(12): 1953–1971.

Hoang K.K. (2014). Flirting With Capital: Negotiating Perceptions of Pan-Asian Ascendency and Western Decline in Global Sex Work. *Social Problems* 61(4): 507–529.

Ilhan-Nas T., Sahin K., Cilingir Z. (2011). International Ethnic Entrepreneurship: Antecedents, Outcomes and Environmental Context. *International Business Review* 20(6): 614–626.

Ionesco D., Mokhnacheva D., Gemenne F. (2016). *The Atlas of Environmental Migration*. London: Routledge.

Johnson P.J. (2000). Ethnic Differences in Self-Employment Among Southeast Asian Refugees in Canada. *Journal of Small Business Management* 38(4): 78–85.

Kloosterman R., Rath J. (2001). Immigrant Entrepreneurs in Advanced Economies: Mixed Embeddedness Further Explored. *Journal of Ethnic and Migration Studies* 27(2): 189–201.

Kloosterman R., van der Leun J., Rath J. (1999). Mixed Embeddedness: (In)Formal Economic Activities and Immigrant Businesses in the Netherlands. *International Journal of Urban and Regional Research* 23(2): 252–266.

Lewis B. (1995). *The Middle East: A Brief History of the Last 2,000 Years*. New York: Simon and Schuster.

Light I. (1979). Disadvantaged Minorities in Self-Employment. *International Journal of Comparative Sociology* 20(1–2): 31–45.

Light I., Sabagh G., Bozorgmehr M., Der-Martirosian C. (1994). Beyond the Ethnic Enclave Economy. *Social Problems* 41(1): 65–80.

Lundström C. (2017). The White Side of Migration: Reflections on Race, Citizenship and Belonging in Sweden. *Nordic Journal of Migration Research* 7(2): 79–87.

Mombeuil C., Fotiadis A.K., Aimable W. (2021). Institutional Reforms, Control of Corruption, and Diaspora Entrepreneurship: Insights and Perspectives on America's Poorest Economy. *Journal of Entrepreneurship and Public Policy* 10(4): 471–491.

Nader L. (1972). *Up the Anthropologist: Perspectives Gained From Studying Up*. Berkeley: University of California., Working Paper.

OECD/European Commission (2019). *The Missing Entrepreneurs: Policies for Inclusive Entrepreneurship*. Paris: OECD Publishing.

Ono M. (2015). Descending From Japan: Lifestyle Mobility of Japanese Male Youth to Thailand. *Asian Anthropology* 14(3): 249–264.

Passport Index (2021). https://www.passportindex.org/byRank.php (accessed 14 March 2024).

Persky J. (1995). The Ethology of Homo Economicus. *Journal of Economic Perspectives* 9(2): 221–231.
Philippines Visa (2021). https://www.philippinesvisa.com/ (accessed 14 March 2024).
Portes A., Shafer S. (2007). Revisiting the Enclave Hypothesis: Miami Twenty-Five Years Later, in: M. Ruef, M. Lounsbury (eds), *The Sociology of Entrepreneurship*, pp. 157–190. Leeds: Emerald Group.
Portes A., Haller W.J., Guarnizo L.E. (2002). Transnational Entrepreneurs: An Alternative Form of Immigrant Economic Adaptation. *American Sociological Review* 67(2): 278–298.
Renaud F.G., Bogardi J.J., Dun O., Warner K. (2007). *Control, Adapt or Flee: How to Face Environmental Migration?* Bonn: United Nations University UNU-EHS.
Rusinovic K. (2008). Transnational Embeddedness: Transnational Activities and Networks Among First- and Second-Generation Immigrant Entrepreneurs in the Netherlands. *Journal of Ethnic and Migration Studies* 34(3): 431–451.
Sassen S. (1991). *The Global City*. *New York, London, Tokyo*. Princeton, NJ: Princeton University Press.
Saxenian A. (2002). Silicon Valley's New Immigrant High-Growth Entrepreneurs. *Economic Development Quarterly* 16(1): 20–31.
Scott A.J. (1998). *Regions and the World Economy: The Coming Shape of Global Production, Competition, and Political Order*. Oxford: Oxford University Press.
Scott A., Storper M. (2003). Regions, Globalization, Development. *Regional Studies* 37(6–7): 579–593.
Selmer J., McNulty Y., Lauring J., Vance C. (2018). Who Is an Expat-Preneur? Toward a Better Understanding of a Key Talent Sector Supporting International Entrepreneurship. *Journal of International Entrepreneurship* 16(2): 134–149.
Sklair L. (2012). Transnational Capitalist Class. *The Wiley-Blackwell Encyclopedia of Globalization.*
Solano G., Schutjens V., Rath J. (2022). Multifocality and Opportunity Structure: Towards a Mixed Embeddedness Model for Transnational Migrant Entrepreneurship. *Comparative Migration Studies* 10(1): 1–24.
Sosnowska A. (2016). *Polski Greenpoint a Nowy Jork: Gentryfikacja, Stosunki Etniczne i Imigrancki Rynek Pracy na Przełomie XX i XXI Wieku*. Warsaw: Wydawnictwo Naukowe Scholar.
Sosnowska A. (2017). The Polish Female Immigrant Niche. Domestic Cleaners in New York City at the Turn of the Twentieth and Twenty-First Century. *Studia Migracyjne – Przegląd Polonijny* 43(1): 111–132.
Stone I., Stubbs C. (2007). Enterprising Expatriates: Lifestyle Migration and Entrepreneurship in Rural Southern Europe. *Entrepreneurship and Regional Development* 19(5): 433–450.
Torkington K. (2010). Defining Lifestyle Migration. *Dos Algarves* 19: 99–111.
UN DESA (2020). https://www.un.org/en/global-issues/migration (accessed 15 March 2024).
Vance C.M., Bergin R. (2019). The Social Expat-Preneur: Examining a Growing International Career Model Supporting Global Social Entrepreneurship, in: N. Iyigun (ed.), *Creating Business Value and Competitive Advantage with Social Entrepreneurship*, pp. 186–204. Hershey, PA: IGI Global.
Verver M., Passenier D., Roessingh C. (2019). Contextualising Ethnic Minority Entrepreneurship Beyond the West: Insights from Belize and Cambodia. *International Journal of Entrepreneurial Behavior & Research* 25(5): 955–973.
Waldinger R.D., Aldrich H., Ward R. (1990). *Ethnic Entrepreneurs: Immigrant Business in Industrial Societies*. Newbury Park, CA: Sage.
Wallerstein I. (1987). World-Systems Analysis, in: A. Giddens, J.H. Turner (eds), *Social Theory Today*, pp. 309–324. Stanford, CA: Stanford University Press.
Wallerstein I.M. (2004). *World-Systems Analysis: An Introduction*. Durham: Duke University Press.
Weiss A. (2005). The Transnationalization of Social Inequality: Conceptualizing Social Positions on a World Scale. *Current Sociology* 53(4): 707–728.

Wilson K.L., Portes A. (1980). Immigrant Enclaves: An Analysis of the Labor Market Experiences of Cubans in Miami. *American Journal of Sociology* 86(2): 295–319.

Wimmer A., Glick Schiller N. (2002). Methodological Nationalism and Beyond: Nation-State Building, Migration and the Social Sciences. *Global Networks* 2(4): 301–334.

WIPO (2021a). https://www.wipo.int/ipstats/en/statistics/country_profile/profile.jsp?code=NL (accessed 14 March 2024).

WIPO (2021b). https://www.wipo.int/ipstats/en/statistics/country_profile/profile.jsp?code=ng (accessed 14 March 2024).

Wolf E.R. (2010). *Europe and the People without History*. Berkeley: University of California Press.

World Bank (2019). https://datacatalog.worldbank.org/dataset/world-development-indicators (accessed 14 March 2024).

World Bank (2021a). https://data.worldbank.org/indicator/SL.SRV.EMPL.ZS?locations=NL (accessed 14 March 2024).

World Bank (2021b). https://data.worldbank.org/indicator/SL.SRV.EMPL.ZS?locations=NE (accessed 14 March 2024).

Yamamura S., Lassalle P. (2022). Extending Mixed Embeddedness to a Multi-Dimensional Concept of Transnational Entrepreneurship. *Comparative Migration Studies* 10(1): 1–23.

How to cite this article: Girling R. (2024). Global Embeddedness: Situating Migrant Entrepreneurship within an Asymmetrical, Global Context. *Central and Eastern European Migration Review* 13(1): 109–127.

Central and Eastern European Migration Review
Received: 17 November 2022, Accepted: 19 March 2024
Published online: 8 May 2024
Vol. 13, No. 1, 2024, pp. 129–149
doi: 10.54667/ceemr.2024.07

The Emigration-Region Concept, Emergence Mechanism and Characteristics: A Case Study of the Opolskie Voivodeship

Krystian Heffner*, Brygida Solga*

This paper presents the concept of the emigration region that emerged as a result of wide research identifying the causes of emigration and migration networks, as well as the demographic and socio-economic consequences of significant emigration for particular regions. It is an overview based on long-standing research by the authors and draws heavily on numerous contributions that address the links between regional development and long-term migration outflow. The hypothesis is that an emigration region is formed under the influence of long-term and mass emigration resulting in progressive depopulation and characterised by a set of economic, social and cultural features clearly distinguishing it from regions where such a pattern of relationships is either missing or incidental. Identified features of emigration regions include a well-established tradition of emigration, the long-term nature of emigration, a significant quantitative dimension of emigration, well-developed networks of social relationships between the countries of outflow and inflow, the complex socio-political and economic reasons for emigration and the specific consequences of it, observed both at the individual (micro) level and at the level of local and regional communities (the meso level). The concept of an emigration region is illustrated by the example of the Opolskie Voivodeship (Poland, a NUTS-2 region). The concept of an emigration region emerged as a result of many years of research by the authors, implemented mainly in the Opolskie Voivodeship. The research methods were diverse (including quantitative and qualitative social research) and the research was conducted among the entities involved to varying degrees in broadly understood migration processes (emigrants, re-emigrants, regional and local governments, entrepreneurs).

Keywords: migration outflow, emigration region, regional development

* University of Economics in Katowice, Poland. Address for correspondence: heffner@ue.katowice.pl.
** Opole University of Technology, Poland. Address for correspondence: B.Solga@po.edu.pl.

Introduction

The formation of transnational migration spaces under the influence of geographical, cultural, social, economic and political determinants is one of the features of contemporary international migration (Faist 2000; Pries 1999). In Europe, such spaces emerged between France and the Maghreb countries and between Germany and Turkey. However, mass emigration from Mexico to the United States is an area where the formation of such a space is the most apparent (Cornelius 2018; Faist 1993; Zong and Batalova 2018). There is no doubt that this situation leads to specific social and economic processes in both the emigration and the immigration regions. Until now, the scientific discourse regarding population flows between such areas has focused more on the issue of immigration (Borjas 1990; Chiswick and Miller 2009; Docquier and Marfouk 2006; Jasso and Rosenzweig 1995; Mattoo, Neagua and Özden 2008; Tienda and Raijman 2004).

Focusing more on the consequences of migration for the regions of immigrants' places of origin was associated with the phenomenon of human-capital flight and the increasing scale of movement from areas of excess workforce and low wages to regions where labour resources are insufficient and wages are relatively high (Passaris 1989). Development policy has also been increasingly linked to emigration (de Haas 2007a; Naerssen, Spaan and Zoomers 2008; Pries 2006; Skeldon 1997). Mediterranean countries in which migrants proved to be an element of the political, social, economic and cultural changes are a convincing reflection of these observations (Bratti and Conti 2017). Nowadays it is often shown that emigration has a positive impact in the emigrants' regions of origin (due, *inter alia*, to financial transfers, social remittances and know-how) as well as the measurable benefits of return migration (Fihel and Kaczmarczyk 2009; García 2018; Glytsos 2002; Kapur and McHale 2012; King, Strachan and Mortimer 1986; Levitt 1998; Levitt and Lamba-Nieves 2010; Lewis 1986; Taylor 1999). The question of social remittances and their significance for the development of regions with significant migration outflows has been noted and discussed in the Polish migration literature (i.e., White and Grabowska 2019).

The findings from the analysis of the causes and consequences of emigration in regions characterised by a significant, long-term outflow of population – and the results of many years of the authors' research in this field – have become the starting point for the development of the concept of an 'emigration region'. The paper presents its basic elements, i.e., the definition of the emigration region, the mechanism of its origin and the distinctive features of such an area. Among the identified features of an emigration region are a large-scale and permanent dimension of emigration, complex conditions and long traditions of emigration, a wide network of migration relationships, emigrants' contacts with the region of origin (circular migration movements and sentimental tourism) and emigration as an important determinant in the regional development.

The presentation of the concept of the emigration region was preceded by an analysis of both migration theories and theories of regional development in terms of their application when explaining the phenomenon of mobility in the emigration region. This review showed that both the theoretical achievements of regional development and migration theories contain specific elements applicable to the concept of an emigration region – e.g., the theory of migration networks from the perspective of achievements regarding migration issues and the theory of cumulative causes from that of regional development. At the same time, the overview of migration theories and theories of regional development allowed us to identify those referring the most to migration processes in regions characterised by significant population outflow and depopulation. Thus, they can be perceived as a theoretical basis for the concept of an emigration region in two ways: as a process of formation of such a region and of identification of its characteristic features. In the existing, vast theoretical output there is a shortage of theoretical approaches which would directly address this issue. For this reason, an attempt has been made to formulate the concept of an emigration region. As the analysis of the relationship between migration outflow and the region's development is based mainly on Poland's experience (especially the

Opolskie Voivodeship), the conclusions were formulated as a concept rather than a comprehensive theory. However, it was assumed that the article can become a good starting point for further scientific discussion expanding the understanding of the emigration region and situating it in the current range of theories identifying factors initiating permanent migration processes at different scales.

Basing the empirical part of the article on the authors' long-term research can be justified by the main goal, which is to present the concept of an emigration region. Indeed, it is assumed that the proposal of such a concept cannot and should not be the result of a single empirical study but, rather, the result of many in-depth analyses – both quantitative and qualitative. The article is therefore based on a holistic methodological approach, the results of which are presented in the conclusion part. At the same time, the analysis of the migration we conducted allows us to assume that the concept of an emigration region may be universal and relate to the regions whose demographic, social and economic development is determined by long-term foreign migration.

The choice of the Opolskie Voivodeship for the analysis of the concept of an emigration region is determined by the long-term nature of migration processes – dating back to the second half of the 19th century and intensifying after the end of World War II – and in a decade of the 1980s and 1990s. Ethnic determinants and the related departures of people of German origin, as well as the possibility of working legally in Germany and other European Union countries long before Poland's accession to the European Union, were a specific feature of the migrations of that period. Due to the large scale of emigration and the durability of this process, the Opole region is an area where the consequences of migration are the most noticeable, both economically and socially. Counteracting the negative effects of this process and minimising their scale has also become one of the key challenges for the development of this region.

Theory review: theories of migration and of regional development versus the concept of the emigration region

Theories of regional development refer to migration as an important determinant of territorial changes, whereas migration models refer to regional aspects. However, in the theoretical achievements of regional development, migration is a much more important analytical category than migration theories explaining regional development. In the latter, the diversified level of socio-economic development observed in the regions and the resulting differences in the income of residents are perceived as the main cause of economic migration. We can therefore discover the most about this type of relationship (i.e., emigration from regions) in economic approaches applied in migration analyses (e.g., Harris and Todaro 1970; Stark and Taylor 1991). These theories present migration as an economic phenomenon and, if they relate to its social determinants, they are perceived as complementary (de Jong and Fawcett 1981). On the other hand, the authors of theories perceiving migration as a result of the functioning of specific social structures (e.g., Wallerstein 1997) assume a different starting point. The theory of the world system also explains the occurrence of migration by differences between regions; however, the movements are understood here more as a result of the domination of regions with a high level of development over peripheral and backward areas. Also, in the concept of transnational social space, direct attention is paid to processes occurring in outflow regions and to relationships connecting them with inflow areas (Faist 2000; Pries 1999). On the other hand, the concept of social networks relates more to regional development and its important element (entity) – i.e., local communities (e.g., Massey 1999). The concept shows that migration networks are shaped in specific communities, which means that this type of relationship is typical of a given region; they also have their own origin, features and dynamics. In a sense, therefore, they are the result and a reflection of the processes in this region; also – which is a crucial factor for the formation of emigration regions – the operation of such networks significantly increases the probability of further emigration (Bertoli and Ruyssen 2018; Łukaszewska-Bezulska 2021; Massey, Arango, Hugo, Kouaouci,

Pellegrino and Taylor 1994). The concept of transnationalism is closely related to migration networks. It assumes that migrants connect the spaces of their origin countries with those of the countries of migration destination. At the same time, they maintain strong contacts with their families remaining in the country of origin and with local communities. They play an important role in constructing migration networks and transferring economic capital but also play a symbolic role, initiating various social activities (Vertovec 2009).

Theories of regional development analyse migration as a process of spatial mobility in several ways. Some – for example, (neo)classical considerations and theories of polarisation – explicitly refer to people's spatial mobility while, on the basis of other concepts (e.g., endogenous development theories or most location theories), we can only draw implicit conclusions on the migratory aspect of regional development. In traditional theories and models of regional development, movements of production factors – including flows of people – are perceived as an important determinant of development. In the conditions of a modern economy, they should, instead, be approached as a complementary factor, building the exogenous activity of the region and supporting the latter's development (Piché 2013; Stough 2001). However, despite various perspectives, it can be said that migration is widely focused on theoretical considerations on regional development and spatial management. Migration is the most broadly discussed in the models of polarisation (Chase-Dunn and Hall 1991; Hojman and Szeidl 2008; Myrdal 1957; Prebisch 1950). It is even believed that the emigration of the best-educated, the most mobile and entrepreneurial people to developing regions is one of the main reasons for the development of a bipolar (polarised) system. Over time, the sharp polarisation of the development processes, which is a result of indirect cumulative causality, leads to the decrease in human capital in the sending regions and its accumulation in the recipient regions. It is accompanied by an increase in labour productivity in the latter and a decrease in the former (King 2018).

Neoclassical development models are useful in explaining regional development and identifying its determinants. They also directly apply to migration processes. As mentioned above, their basic assumption is that production factors seek a location which ensures the highest productivity (Nijkamp and Abreu 2009). Consequently, regional differences will continue to occur until the productivity of all production factors is equal everywhere. The lack of restrictions related to the flow of capital and labour – i.e., the fact that the production factors are fully mobile – is a very important element of neoclassical models. The free movement of labour and capital allows the achievement of a long-term balance between regions, possible thanks to the self-correcting mechanism. In highly developed regions, the cost of labour is high, due to its low supply (and high demand). This results in migration from regions with surplus labour, which is also relatively cheap. As a consequence, in more-developed areas the price of labour falls while, in the areas from which the labour force migrates, it increases due to the declining supply (e.g. de Haas 2021; Nijkamp and Poot 1998).

Summarising the above overview of migration theories in relation to the theories of regional development, where references are made to migration movements, one can assume, according to the authors, that the following theories are the most useful for conceptualising an emigration region:

- Oded Stark's theory of new economics of labour migration – because it draws attention to the fact that decisions regarding migration are made in social groups, such as the family, household or local community. In this case, the rationalism of choice is the basis for making decisions, which are taken collectively and may depend on the social structure, prevailing traditions, the socio-cultural system and other social determinants.
- Douglas Massey's theory of migration networks – because it assumes that, in creating and sustaining migration in time and space, connections in the form of an information network, assistance and specific obligations established between migrants and non-migrants in the host and sending countries are

important. Migration networks have their own genesis, development model, properties and dynamics; they are also the result of processes and factors specific for a given region.

- Ludger Pries' concept of transnational social space – because, in the formation of transnational migration spaces under the influence of geographic, cultural, social, economic and political factors, it draws direct attention not only to the regions of inflow but also primarily to the regions of outflow. Therefore transnationalism, understood among other interpretations as maintaining contacts between migrants and their families in the region of origin, sending goods and social transfers as well as migrants acting as 'social actors' can all be considered a significant characteristic of the emigration region.
- Gunnar Myrdal's theory of regional polarisation – because it broadly refers to migration as an important determinant in the formation of the bipolar system; it emphasises that the emigration of the best-educated, most mobile and most entrepreneurial people to developing regions threatens the development outflow regions and therefore is one of the main causes of polarisation.

Selected elements of the indicated theories, describing the impact of migration on regional development, are used in the further stages of the analysis. The findings of the research on the origins, permanence and broad influences of migration outflows on the patterns and directions of economic and social development of territories sending migrants – led to the formulation of the concept of the emigration region and especially to the presentation of the process of forming an emigration region, as well as the distinction and description of the features characteristic of such areas.

Methodology and data sources

The concept of the emigration region presented in this paper is the result of many years of research by the authors on the issue of emigration and regional development. The studies included both quantitative and qualitative techniques and the issue of emigration was approached from the perspective of various groups and entities – i.e., both direct participants in the migration process (emigrants and returning emigrants) and representatives of local and regional self-government, public institutions and non-governmental organisations, whose activities are related to migration processes to a certain extent. The results of the research entitled *The Place and Importance of Foreign Migrations in Regional Development* (the project of the National Science Centre) are of key significance (Solga 2013). Research in this field was conducted (through questionnaires and in-depth interviews) with participating marshals of all Polish voivodeships (16 questionnaires), the presidents/mayors/heads of all the communes in the Opolskie Voivodeship (105 questionnaires and in-depth interviews), the directors of all district (*powiat*) labour offices of the Opolskie Voivodeship (11 in-depth interviews) and the directors of selected social welfare centres (10 in-depth interviews). As part of the project, the 71 local strategies of all municipalities of the Opolskie Voivodeship and the 16 regional strategies of all Polish voivodeships, were also reviewed with respect to emigration as a factor of territorial development. In the theoretical part of the project – which is crucial for the emigration region concept, the hypothesis is that an emigration region is formed under the influence of long-term and mass emigration resulting in progressive depopulation; it is characterised by a set of economic, social and cultural features clearly distinguishing it from regions where such a pattern of relationships is either missing or incidental. As indicated above, the theoretical framework for this concept was provided by the approaches formulated in Stark's new economics of labour migration, the theory of migration networks, the concept of transnational social space and the theory of regional polarisation.

On the other hand, in the empirical part of the project, foreign migration in all regions of Poland and selected European and non-European migration regions was recognised in terms of the causes, scale, nature and

consequences of the migration outflow, observed at the level of development of these regions. The issue of migration was analysed from the perspective of various aspects of development – i.e., from the point of view of the functioning of regional and local development units, the activities of selected institutions (e.g., the labour market and social welfare institutions), from the perspective of the strategic management of territorial units and from the development of entrepreneurship. The basic research issues concerned the following areas:

- the assessment of representatives of local and regional authorities regarding the impact of foreign migrations on development;
- the opportunities and threats for the development of regions and local communities resulting from foreign migration;
- the place and significance of foreign migration as a factor of territorial development compared to other development factors;
- the way of approaching foreign migration in strategic documents of territorial units (regions/cities/rural communes);
- the possibility of creating a migration policy at the regional level;
- the possibility to create instruments leading to the reduction of economic emigration and to support effective re-emigration by local and regional authorities; and
- the issues of re-emigration in the context of factors inducing and hindering returns to the region of origin and entrepreneurship among re-emigrants.

Research was also performed among people returning from abroad, mainly in relation to the need to create an institutionalised support system for returnees, as indicated in the concept. In the latter context, the results of the project of the Voivodeship Labour Office in Opole entitled *Developing Methods of Reducing Economic Emigration and Supporting the Return of Migrants to the Polish Labour Market* (in-depth interviews with 70 emigrants) were also used. Furthermore, the paper also considers the results of the research entitled *Influence of Foreign Labour Migrations on the Socio-Economic Situation of the Region. Analysis Based on the Example of the Opolskie Voivodeship as a Migration Region* (a project of the Ministry of Science and Higher Education) and *The Importance of Regional Determinants of Investing in the Process of Investment Location* (the project of the Ministry of Science and Higher Education). In the first case, the results of research among emigrants from the Opolskie Voivodeship (in-depth interviews with 60 emigrants) primarily used issues related to their entrepreneurship while, in the other, the most interesting area concerned the opinions of entrepreneurs regarding factors facilitating or hindering running a business in a region affected by significant emigration (surveys with 146 entrepreneurs from the Opolskie Voivodeship) (Heffner and Solga 2013).

The wide range of research and the resulting conclusions allowed for the formulation of synthetic assessments of the mutual relations between the socio-economic development of regions and the persistent migration outflow, as well as for indicating the possibility of formulating appropriate development policies for regions of this type.

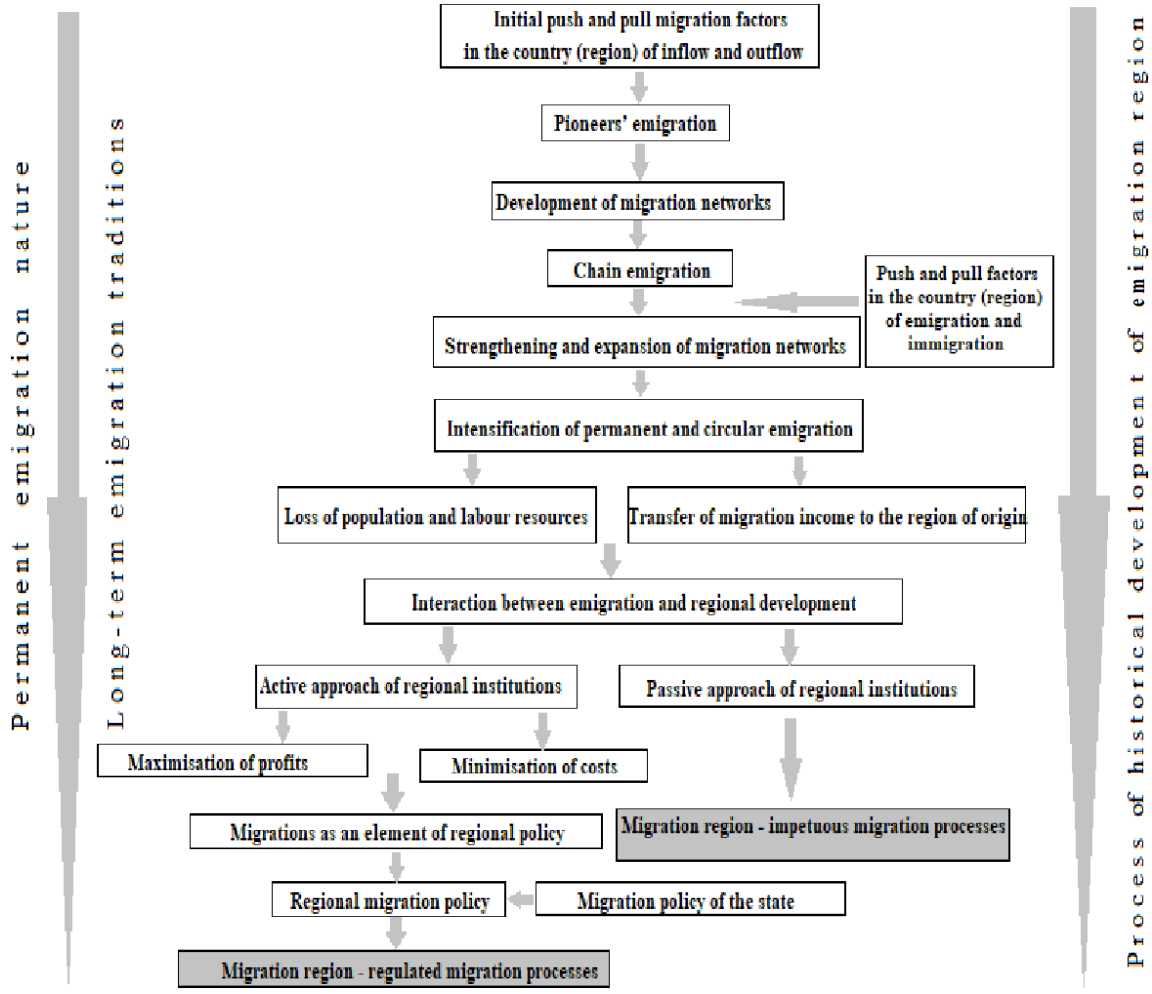
Research results

The concept of an emigration region

An emigration region is an area where outmigration is so important that it affects regional development processes to a significant degree (for example, it results in an unfavourable demographic structure, labour

shortages, limited social activity, the transfer of financial capital used for consumer or investment purposes) in an apparent (positive or negative) way. The driving forces behind the formation of regions with a clear migration factor of development include a well-established tradition of emigration and its long-term nature, a significant quantitative dimension of emigration, well-developed networks of social relationships between the outflow and inflow countries, complex socio-political and economic reasons for emigration, as well as its specific consequences, which are visible both at the individual (micro) level and at the (meso) level of local and regional communities.

Figure 1. Mechanism of emigration-region development



Source: Authors' case study.

An emigration region is formed in the historical process determined by the accumulation and mutual influence of certain economic, political and cultural reasons (*cumulative causation*) (Figure 1). We can therefore speak of an emigration region when a large number of permanent, temporary or circular migrations is observed in a given area, or if there is persistent emigration. Well-established migration traditions, the high level of emigration and its permanent character, as well as well-developed networks of migration connections, together with multiple reasons for emigration, are crucial elements determining the nature of the emigration region. Emigration is therefore such a significant phenomenon in a given region that it has a clear (positive or negative) impact on socio-demographic and economic processes. The depopulation of a region resulting from

emigration and its other consequences thereby becomes one of the main development factors affecting its current and future development (Heffner and Solga 2013). This situation is reflected in the development concepts formulated in the emigration region as well as in the strategic documents resulting from these concepts, where migration issues are the focus of a lot of attention and are perceived as important.

The notion of an emigration region in the proposed concept is considered from the point of view of the regional administrative unit of the country (e.g., in the European Union NUTS level 2). However, it should be noted that the emigration region can be defined in several ways, both with respect to larger areas, most often parts of the continent, as well as to individual countries and, as in the paper, to the administrative units of the country. Such references can be found, for example, in relation to the South-East Asian emigration region as a large area, to Ireland as a whole country and finally to the Oaxaca region in Mexico (Cohen 2010; Stephen 2007). David Chiavacci (2005) applies the notion of a 'migratory region' with reference to East Asia and analyses the factors that caused its emergence. He notices that migration flows in this area are set in the context of economic, political and socio-cultural processes that took place in individual countries of the region. Consequently, at the beginning of the 1980s they led to the emergence of a clearly identified emigration region. The factors leading to its formation included the economic elements (e.g., international corporations in two countries initiating a migratory movement), political relations between individual countries and geographical determinants. However, according to Chiavacci, the principal elements shaping the emigration region include the existence of an international network of relations as well as migration institutions and infrastructure functioning for the needs of migrants. Patrick Ziltener (2006) similarly identifies this area as a 'constituted migration region' and draws attention to the determinants shaping it (e.g., the geographical proximity of the migrants' main countries of origin, large income differences and migrants' social networks).

Features of the emigration region

Through referring to the earlier review of migration theories and regional development theories, as well as considering the results of the present scientific research, the main characteristics of an emigration region and the mechanism of its formation were defined. Furthermore the following features specific to such an area were also distinguished: the significant quantitative and permanent dimensions of emigration, the complex determinants and traditions of migration, the broad network of migratory relations, the stability of migrants' relationships with the region of origin – the circular movements of migrants and sentimental tourism, significant migrant remittances influencing local development and emigration as a crucial determinant of regional development.

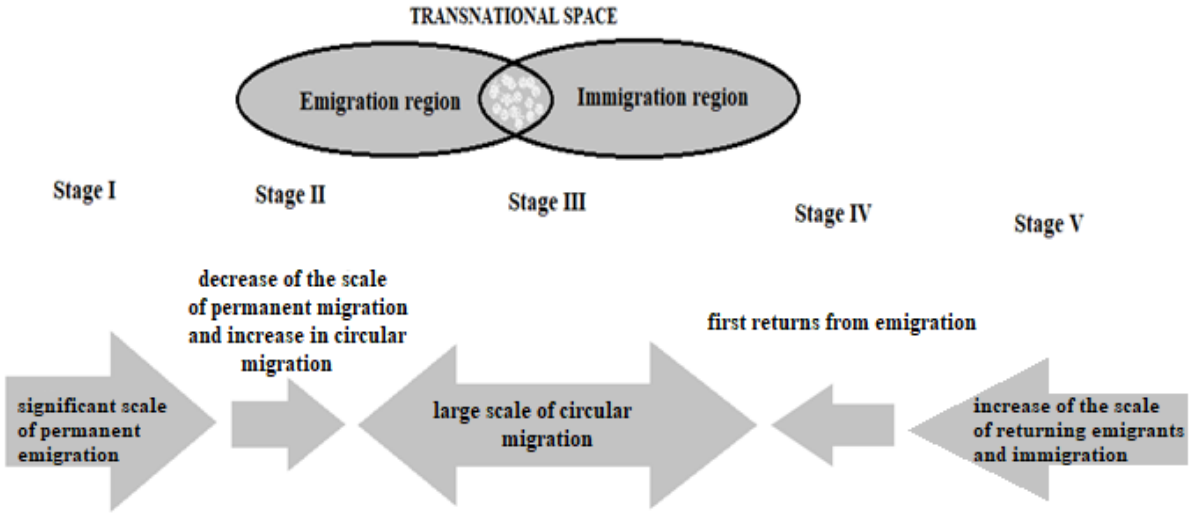
The significant quantitative and permanent dimensions of emigration

The emigration region has a long tradition of emigration on a significant scale. We can speak about a kind of emigration *continuum*, which leads to the permanent depopulation of such an area and results in specific social and economic effects. An emigration level of between 5 and 8 per cent of the (professionally active) population over a specific period can be considered a critical value, indicating the great importance of international migration in the population balance. Research in Central and Eastern Europe shows that, in regions facing long-term emigration, its scale is often higher than 10 per cent and may reach 15–20 per cent of the total population.

An evolution of the emigration process, determined by its social, economic and political transformations, can be observed in an emigration region. It can also be a result of changes in the destination countries. This evolution starts with settlement emigration, which is initially significant in quantitative terms and then changes

into the phase of the growth of circular migration and, at the continuously significant scale of circular migration, the significance of returns from abroad; immigration may increase in the emigration region, reducing the pressure of increasing demographic problems on the functioning of both regional demand, the labour market and public services (i.e. Klagge and Klein-Hitpaß 2010; Kubiciel-Lodzińska and Maj 2021; Kushnirovich 2019; Solga and Kubiciel-Lodzińska 2017) (see Figure 2).

Figure 2. Transformations of migration processes in an emigration region



Source: Authors' case study.

Complex determinants and traditions of migration

In the emigration region, the mechanisms determining migration have a complex and multilateral dimension. The underlying reasons for mass movements include not only the classical determinants, i.e., differences in the level of socio-economic development between the emigrants' place of residence and the destination area and also other circumstances that affect the nature and scale of migration. Such determinants can comprise formal, political and social factors (e.g., immigration-friendly policies in the destination country or persisting patterns of migratory behaviour). Well-developed, thriving and broad migration networks as well as established and long-lasting migration traditions also sustain migration in the emigration region.

Furthermore, the culture of migration – i.e., a set of norms and views on the perception of the phenomenon of migration – is also an important emigration determinant (Kandel and Massey 2002; Massey *et al*. 1994). The migration culture determines the way of life of the emigration region community (families, households, local associations), which adapts it to the migration situation.

Explaining migration in the emigration region should therefore not only be based on the theories related to general *push* and *pull* factors (Lee 1966) and its criticisms (Haberkorn 1981; van Hear, Bakewell and Long 2018; Vogler and Rotte 2000). The explanation of movements only on the basis of macro determinants is certainly also an over-simplification. In the emigration region, migration should be perceived as a result of interactions between phenomena at the macro level and those at the meso and micro levels. Special consideration should be given to the fact that this process is not explained by a single determinant.

The broad network of migratory relations

Migration networks should be credited with playing a key role in the process of creating an emigration region (Fawcett 1989). This is because migration is not only a result of an individual decision made on the basis of the calculation of profits (as advocates of neoclassical economics claim) or of an automatic impulse caused by changes in the global economic situation (as would result from the concept of the global migration system). Relations in the form of an information network, assistance and obligations that facilitate the decision-making processes (deciding on migration) and adaptation processes (abroad), shaped between migrants and non-migrants in the receiving and sending country/region are also important. As a result, due to this type of relationship, both settlement and temporary emigration become much easier there than in regions that do not have wide and efficient migration networks.

The networks of relationship of the emigration region have their own origins, development model, features and dynamics. They are a result of processes and factors specific to this region, so they also react to regional factors implying flows. The prevailing direction of emigration is the factor strengthening the functioning of migration networks. Their greater spatial diversity usually causes weaker network consolidation and thus fewer opportunities to fully use their potential (Solga 2015).

The stability of migrants' relationships with the region of origin: circular movements of migrants and sentimental tourism

Migrants' social, cultural and economic networks are generally extensive in the emigration region. Their efficiency and dynamics depend on the length of migration traditions, the geographical dispersal of migrants' destinations and the level of their mutual integration abroad. Contacts between migrants (definitive) or their descendants and the community in the region of origin develop on the basis of these connections (Heffner 1999; Newbold 2020). Former residents, although already settled abroad, generally do not lose ties with their region of origin and often travel back to their 'roots'. In the case of temporary migrants, we deal with a circular movement between the emigration region and the area of residence abroad. Visits by both groups of migrants to their region of origin contribute to economic recovery and initiate social and cultural cooperation. Migrants often support their region of origin in an organised way (e.g., they establish emigrants' clubs which raise funds for business- and infrastructure-related initiatives). However, it should be assumed that, when the second or third generations of definitive migrants integrate closely with the society in the destination country, the links with their region of origin are of a merely nostalgic nature, if at all.

Emigration as a crucial determinant of regional development

Socio-demographic and economic phenomena accompanying migration are extremely complex in the emigration region, both in spatial and political terms (regional policy). The extent and permanent nature of emigration entails certain demographic, economic and socio-cultural consequences, both positive and negative. Migration and its consequences in the emigration region is one of the most crucial factors directly determining the development opportunities of such an area (Heffner and Solga 2017). Mass emigration can lead to serious demographic disorders. This impact can be manifold and is manifested in a decrease in the birth rate, a decline in fertility, deformations in the structure of age and sex of the population, an ageing society, a decreasing number of marriages, a growing number of broken families and a weakening of social bonds. Emigration can become a factor intensifying the demographic crisis (Heffner, Klemens and Solga 2019).

At the same time, mass emigration can also have a positive impact on reducing the unemployment rate in the emigration region. A level of emigration exceeding the unemployment level may reduce its stimulating impact; however reducing unemployment may not necessarily be accompanied by a simultaneous growth of employment and business activity. The transfer of significant financial resources to the region by people working abroad, which translates into an increase in investment in individual ventures improving the quality of life and social prestige, may do little to increase development potential. This means that emigrants may be less willing to take risks associated with entrepreneurial activities and can easily accept continuing foreign circular migration. As a result, new workplaces are not created in the emigration region, which further encourages groups of residents to seek employment abroad.

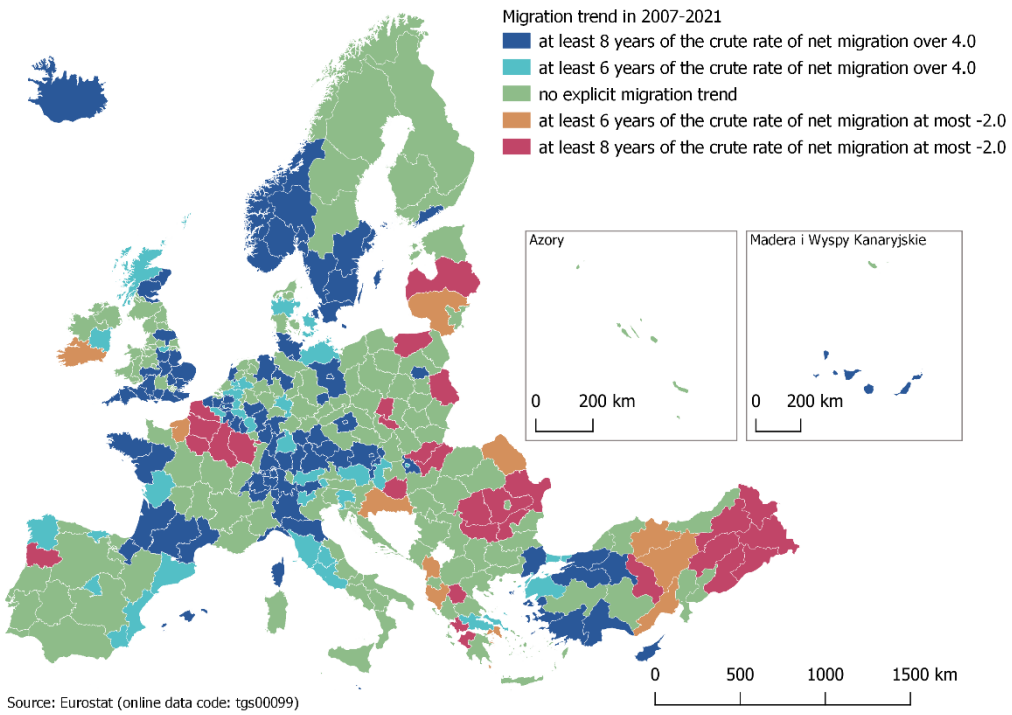
The adverse impact of emigration (definitive and circular) on economic development in the context of the *brain drain* phenomenon is also important. There is a constant drainage of the most active and best prepared or educated residents, who can change circular economic migration into definitive emigration. As a result of this trend, the emigration region loses its most mobile labour resources and their gradual negative selection is observed. Emigration may include large groups of employees with certain specialisations (e.g., in construction, food, agriculture, horticulture and medicine) on local labour markets, which significantly weakens the region's location potential and, as a result, also its investment attractiveness. This situation may adversely affect the development of small and medium-sized enterprises which, in a situation of persistent intensified emigration, lose their opportunities for activity and development.

The social consequences of family separation and the disintegration of family ties are especially disadvantageous. Emigration from the region usually contributes to the emergence of broken families as well as the cultural and social approval of the family model functioning in a state of permanent separation. Due to the growing scale of emigration, the incidence of this category of families and their problems increases the most frequently (Solga 2014).

The concept of an emigration region as a result of research on the impact of external migration on the development of the Opolskie Voivodeship

The concept presented here of an emigration region is applicable to territorial structures characterised by a significant and long-lasting outflow of migrants, which permanently affects demographic, social and economic processes, significantly hindering and slowing down their development. As indicated in the introduction, Poland is an emigration country with a growing share of immigration, still characterised by a high scale of outflow and its significant spatial concentration in the regional system. The Opolskie Voivodeship is one of the most distinctive regions, where features of territorial emigration structure have emerged. Studies thus far show that this area is one of the most important emigration regions – not only in Poland but also in a broader European approach (see Figure 3).

Figure 3. Permanence of significant migration outflow/inflow as a feature of emigration and immigration regions



Source: Eurostat (online data code: tgs00099).

Though, after 2004, the quantitative dimension of migration outflow from regions of marginal importance increased, the Opolskie Voivodeship is still an area with a considerable scale of outflows. An analysis of the number of emigrants per 1,000 inhabitants shows that the most intensive outflow of population abroad (106 people per 1,000 inhabitants) on a national scale is still in the Opolskie Voivodeship (Census 2011 data and subsequent CSO estimates). Also, in the European context, the region belongs to the group of entities with a long-term negative population balance resulting from the permanent outflow of migration (DEMIFER 2010), which constitutes a set of characteristics typical of an emigration region. On the basis of a multi-annual series (2007–2018) relating to regional migration flows in the regions of Europe (NUTS-2 units), they were classified in the context of the relative net migration balance and the length of the period with a positive or a negative balance of flows. This provided the basis for determining the sustainability of these phenomena on a regional scale in Europe, with the main focus on groups of regions in which a clearly positive (immigration) or negative (emigration) balance of population flows was maintained during most of the period analysed. It should be clear that the data concerning migration flows on a regional scale in Europe are burdened with numerous and common inaccuracies and, moreover, that there are also gaps in information as well as inconsistent rules for separating regional units in EU countries and changes in their scope. However, if the persistence of migration trends is the main factor analysed, despite the above limitations, they provide an interesting image of the distribution of regions with a completely different development situation caused by the possible impact of migration. These are mainly regions where the migration outflow or inflow is a constant (or relatively constant) component of population changes interacting and having a long-term impact on regional development processes. This may also be a symptom of significant inequalities in the level of development of European regions (Iammarino,

Rodriguez-Pose and Storper 2019). In Poland there are several regions that clearly have an emigration character (Lubelskie, Opolskie, Warmińsko-Mazurskie, Podlaskie and Podkarpackie).[1] This type of region is also found in France (5), Greece (4), Hungary (3), Bulgaria (2), Portugal (1), Romania (1) and Latvia (1). There are many more immigration regions, mainly found in Germany (17), Great Britain (16), France (5), Northern Italy (5), Sweden (6) and Norway (6), as well as Belgium, Spain, the Netherlands, Finland, Denmark and Luxembourg (see Figure 3).

A constantly negative migration balance was recorded in the Opolskie Voivodeship for almost the entire period after World War II (from 1950), mainly due to intensive, historically determined emigration, primarily to Germany. By the end of the 1990s, over 200,000 people had emigrated, mainly those with dual (Polish–German) citizenship living in compact areas of the central and eastern part of the region. Emigration covered the entire population growth of this group of people from 1975 to 2000, and in many communes the outflow even significantly exceeded it. It is estimated that the current scale of labour emigration, including circular and seasonal migration, is approximately 120,000 people.

The persistence of a permanent and quantitatively significant level of emigration in the Opole region is possible thanks to the existence of a well-established, resilient, dynamic and well-developed network of migration links between the inhabitants of the Opolskie Voivodeship and the countries of Western Europe, mainly Germany, as a result of (or resulting from) permanent and long-term emigration. Similar migration networks can also be noticed in other regions of Poland – e.g., Podhale and Podlasie (Górny and Śleszyński 2019) – and abroad (Keles 1985); however, they are nowhere so well-developed and versatile. The research showed that in the 1990s for every 100 people in the Opolskie Voivodeship there were over 120 family members living in Germany.

Due to the large scale and durability of emigration, its consequences for the development trends of the Opolskie Voivodeship are clearly visible. They have a special impact on the deteriorating population situation. The constantly negative emigration balance, which has been observed for several decades, together with the negative population growth, has led to a continuous decline in the region's population. According to projections, by 2050, population losses may even have reached a quarter of the current figure. The economic consequences are also important. While absorbing some of the mobile labour resources, emigration affects its supply and availability on the regional labour market and, at the same time, reduces the unemployment level. The research shows that unemployment in the Opolskie Voivodeship would be twice as high if all its former inhabitants working abroad returned and registered for employment in the region. On the other hand, emigration affects the loss of labour resources. Some local labour markets lost 20–30 per cent of all their workers, especially in certain industries – mostly construction and the healthcare sector. Labour shortages are a significant problem, reducing the investment attractiveness of the region and becoming a barrier to many companies' development. Local and regional survey evidence has shown that significant money transfers (remittances), which raise the migrant families' standard of living but do not substantially translate into an increase in investment and growth in the level of entrepreneurship, are of vital importance, both for local and regional development in the Opolskie Voivodeship.

The issues closely related to emigration and its economic and social consequences are a particularly crucial element of the development policy of the Opolskie Voivodeship, at both a regional and a local level. They can be seen both in these regions' strategic documents and in the projects for practical solutions that take account of migration issues. At the regional level, the most important initiative is the *Program Specjalnej Strefy Demograficznej 'Opolskie dla Rodziny'* (*the Special Demographic Zone Programme 'Opolskie for the Family'*), which was created as a separate operational tool suited to the demographic situation in the region. At the national level, the programme is a pioneering project that contains the concept of managing a region facing the permanent loss of human resources. Regionally implemented organisational measures in the social

sphere, political recommendations highlighting the migratory background of the region's slowdown in development and numerous initiatives supporting economic increase (e.g. establishing companies by re-emigrants, investing in local initiatives, strengthening entrepreneurship, attracting competitive investors, etc.) are manifestations of specific, characteristic features that distinguish the development of emigration regions from other types of regional structure.

Conclusions

The existing literature on the relationship between migration and the development of regions dominated by migration outflows focuses on the analysis of factors favouring outward migration. These factors include, especially, migration networks (e.g., DiMaggio and Garip 2012; Lamela, Pérez-Caramés and Fernández-Suárez 2012; Palloni, Massey, Ceballos, Espinosa and Spittel 2001; Stenning and Dawley 2009), some of the effects of emigration (e.g., Clark and Drinkwater 2008; Garip 2012; Garip and Curran 2010; Garip *et al*. 2015), the transition process from pioneer migration originating in a particular region to transnational networks and migration systems (e.g., Bakewell, de Haas and Kubal 2012; van Hear *et al.* 2018) and on the extent to which the state migration policy has intervened in this process (e.g., Czaika and de Haas 2013).

It is the intention of the authors to contribute to and build on the existing literature by pointing out the holistic dimension of the process of forming an emigration region, the factors that characterise this type of region and the multidimensional consequences for its development. As it stands, the article fills a gap in the theoretical perception of the emigration region.

Several years of research enable us to demonstrate that the emigration region is an area where outward migration is such a significant phenomenon that it explicitly (in a positive and/or negative way) affects the socio-demographic and economic processes in such an area. According to the assumptions of the methodological section, in addition to the definition of an emigration region proposed above, it is also possible to indicate the factors affecting the formation of such an area. The driving forces behind the emergence of regions with a clearly identified emigration factor of development include:

- a well-established tradition of emigration and the long-term nature of emigration;
- a significant quantitative dimension of emigration;
- well-developed networks of social relationships between the country of outflow and that of inflow;
- the complex socio-political and economic reasons for emigration; and
- the specific consequences of emigration, observed both at the individual (micro) level and at the level of local and regional communities (meso).

A migration region has a long tradition of migration and the scale of emigration is significant there. In the emigration region, the mechanisms determining migration have a complex and multifaceted dimension. The causes of mass migration are not only based on classical factors such as differences in the level of socio-economic development between the emigrants' place of residence and the destination area but also in additional circumstances that affect the nature and scale of migration. Formal and political considerations or social factors (including an immigration-friendly policy of the country of immigration or persistent migration behaviour patterns) can represent such determinants (Aslany, Carling, Mjelva and Sommerfelt 2021). Well-developed migration networks and long migration traditions also sustain migration in the emigration region. As an effect, due to this type of connection, both permanent and temporary emigration become much easier to achieve than in regions without broad and efficiently functioning migration networks. As a result of these connections, international migration becomes a social process, gradually involving both local communities and foreign

clusters of migrants from those communities. Based on these connections, contacts of (definite) migrants or their descendants with members of the community of the region of origin are growing. The massive and permanent nature of migration entails certain demographic, economic and socio-cultural consequences – in both positive and negative dimensions. In a migration region, they become significant factors directly affecting the possibilities and directions of development of such an area.

This situation therefore poses a serious threat to the further development of a region like this. Findings relating to countries of migration outflow are fully applicable here, indicating that emigration is highly selective and affecting predominantly the most dynamic, younger and better-trained elements of the regional population (Budyta-Budzyńska 2016; LeSage and Ha 2012). Outflows incur costs for emigration regions (education and training are investments in human capital that result in the development of host regions) and, in long-lasting terms, give a negative effect in both considering the region's growth potential as well as in decreasing chances for the improvement of the attractiveness of investment and the regional labour market, since human capital plays a decisive role in both processes (i.e., De Haas 2007b; Alonso 2011; Dustmann, Fadlon and Weiss 2011).

Extensive research in the Opolskie Voivodeship has shown that the persistence of the migration outflow process and its impact on the declining demographic potential of the region, the population ageing and qualitative deficits in the labour market are all caused by the long-lasting lack of significant changes in the structure of the region's economy. Too-weak external intervention, aimed mainly at improving infrastructure and accelerating economic development (e.g., resulting from the EU cohesion policy), is not sufficient to reverse migration outflow trends if achieving a higher level of development is not accompanied by profound structural changes in the region's economy (e.g., attractive jobs, institutions and companies employing regional university graduates, higher spending on the development of the regional R&D sector, etc.). Such a situation has been persisting in the Opolskie Voivodeship for several decades and therefore the migration syndrome has become a permanent and characteristic feature of its development.

Based on the research we conducted, some political implications may be also formulated which, according to the research assumptions, can be applied to the implementation of development policy in emigration regions. The negative impact of a continuous, negative balance of international migration on the demographic and socio-economic structure of the emigration region indicates the need to develop a clearly specified policy that takes account of migration issues (a regional migration policy). Activities in the sphere of emigration are extremely important, primarily in terms of the protection of human and intellectual potential, the prevention of permanent emigration and, at the same time, the promotion of the temporary emigration that enables the personal and socio-cultural development of migrants and the strengthening of their business opportunities. Activities in the sphere of returning emigrants are also important. As indicated, the benefits that returning emigrants can bring include their human capital (education, qualifications, training and knowledge), financial capital and entrepreneurial potential (foreign investment, trade, remittances, savings, investment in new businesses, purchase of real estate, and charitable support), social capital (the networks of contacts, norms and values facilitating cooperation within various groups) and affective capital (commitment and goodwill arising from emotional ties with the region of origin; cf. Roos 2021). Research at the regional level in Poland shows that, despite the significant impact and importance of emigration and return migration, the best results in emigration-region development may be achieved from a comprehensive approach to the regional development policy where the migration outflow is only one of several elements related to the emigration region's development path. This means that, while establishing its foundations and then undertaking activities, all elements related to the broadly understood foreign mobility of the regional population should be considered (Iammarino *et al*. 2019). They include not only departures and returns but also immigration by foreigners and potential emigration, including foreign students (Rokita-Poskart and Mach 2019).

As indicated in the theoretical section and re-iterated in the methodological part, the concept of an emigration region was developed based on the migration experience of the Opolskie Voivodeship. It is assumed that this concept can become a good starting point for further scientific discussion identifying further features of the emigration region (for example, return migration or the transformation of the emigration region into an immigration region due to the influx of new residents and workers mitigating the labour market losses) and supplemented with further examples of European and non-European countries and regions. The concept of a migration region can also be an important starting point for expanding migration theories to include issues related to the relationship between migration and regional development. The main contribution to these theories is the statement that, in regions characterised by a significant and long-lasting population outflow, migration becomes a significant component of regional development. In both a positive and a negative sense – and through direct or indirect means – they affect the fundamental determinants of regional development: human, social and financial capital. The assessment of this impact can be ambivalent, although a number of studies, including those presented in this article, indicate to a lesser extent the opportunities and, to a greater extent, the threats associated with the process of emigration for sending regions.

Note

1. Opolskie, Lubelskie, Warmińsko-Mazurskie, Małopolskie, Podlaskie and Podkarpackie voivodeships are regional units in the administrative division of Poland; in the common classification of territorial units for EU statistical purposes, they are NUTS-2 level units. NUTS (*Nomenclature des unités territoriales statistiques* (fr.), *Nomenclature of Territorial Units for Statistics* (eng.)) is a geocode standard for referencing the administrative divisions of countries for statistical purposes used in the European Union. It was adopted in 2003, developed and regulated by the European Union. Actually covers the EU member and candidate states in detail. The Nomenclature of Territorial Units for Statistics is instrumental in the European Union's Structural Funds and Cohesion Fund delivery mechanisms. The structure of NUTS comprises 3 hierarchical levels NUTS-1 (Macro-regional), NUTS-2 (Regional) and NUTS-3 (Sub-regional) (https://ec.europa.eu/eurostat/web/nuts/history).

Conflict of interest statement

No conflict of interest was reported by the authors.

ORCID IDs

Krystian Heffner https://orcid.org/0000-0002-2737-6417
Brygida Solga https://orcid.org/0000-0002-5097-9339

References

Alonso J.A. (2011). *International Migration and Development: A Review in Light of the Crisis*. CDP Background Papers 11(E). https://www.un.org/development/desa/dpad/wp-content/uploads/sites/45/publication/CDP-bp-2011-11-E.pdf (accessed 2 April 2024).

Aslany M., Carling J., Mjelva M.B., Sommerfelt T. (2021). Systematic Review of Determinants of Migration Aspirations. Southampton: University of Southampton, QuantMig Project Deliverable D2.2.

Bakewell O., de Haas H., Kubal A. (2012). Migration Systems, Pioneer Migrants and the Role of Agency. *Journal of Critical Realism* 11(4): 413–437.

Bertoli S., Ruyssen I. (2018). Networks and Migrants' Intended Destination. *Journal of Economic Geography* 18(4): 705–728.

Borjas G. (1990). *Friends or Strangers: The Impact of Immigrants on the U.S. Economy*. New York: Basic Books.

Bratti M., Conti C. (2017). The Effect of Immigration on Innovation in Italy. *Regional Studies* 52(7): 934–947.

Budyta-Budzyńska M. (2016). Post-Accession Emigration from Poland: A New or Old Kind of Emigration? Notes on the Book *A Decade of Poland's Membership in the European Union. The Social Consequences of Emigration from Poland After 2004*. *Central and Eastern European Migration Review* 5(1): 151–156.

Chase-Dunn C., Hall T. (1991). *Core/Periphery Relations in Precapitalist Worlds*. London, New York: Routledge.

Chiavacci D. (2005). Ein Strom, der sich nicht aufhalten lässt. Die ostasiatische Migrationsregion: Grenzen, historische Entwicklung und innere Strukturen. *Südostasien* 3: 7–10.

Chiswick B., Miller P.W. (2009). The International Transferability of Immigrants' Human Capital. *Economics of Education Review* 28(2): 162–169.

Clark K., Drinkwater S. (2008). The Labor-Market Performance of Recent Migrants. *Oxford Review of Economic Policy* 24(3): 496–517.

Cohen J.H. (2010). Oaxacan Migration and Remittances as They Relate to Mexican Migration Patterns. *Journal of Ethnic and Migration Studies* 36(1): 149–161.

Cornelius W. (2018). *Mexico: From Country of Mass Emigration to Transit State*. Discussion Paper No. IDB-DP-00630. https://publications.iadb.org/en/publications/english/viewer/Mexico-From-Country-of-Mass-Emigration-to-Transit-State.pdf (accessed 2 April 2024).

Czaika M., de Haas H. (2013). The Effectiveness of Immigration Policies. *Population and Development Review* 39(3): 487–508.

De Haas H. (2007a). *Migration and Development: A Theoretical Perspective*. Bielefeld: Center on Migration, Citizenship and Development, Working Paper 29.

De Haas H. (2007b). Turning the Tide? Why Development Will not Stop Migration. *Development and Change* 38(5): 819–841.

De Haas H. (2021). A Theory of Migration: The Aspirations-Capabilities Framework. *Comparative Migration Studies* 9(1): 8.

De Jong G., Fawcett J. (1981). Motivations for Migration: An Assessment and a Value-Expectancy Research Model, in: G. De Jong, R. Gardner (eds), *Migration Decision Making. Multidisciplinary Approaches to Microlevel Studies in Developed and Developing Countries*, pp. 13–58. New York: Pergamon Press.

DEMIFER (2010). *Demographic and Migratory Flows Affecting European Regions and Cities*. *Final Report*. Luxembourg: ESPON.

DiMaggio P., Garip F. (2012). Network Effects and Social Inequality. *Annual Review of Sociology* 38: 93–118.

Docquier F., Marfouk A. (2006). International Migration by Education Attainment 1990–2000, in: C. Özden, M. Schiff (eds), *International Migration, Brain Drain and Remittances*, pp. 151–199. New York: World Bank, Palgrave Macmillan.

Dustmann C., Fadlon I., Weiss Y. (2011). Return Migration, Human Capital Accumulation and the Brain Drain. *Journal of Development Economics* 95(1): 58–67.

Faist T. (1993). Ein- und Ausgliederung von Immigranten: Türken in Deutschland und mexikanische Amerikaner in den USA in den achtziger Jahren. *Soziale Welt* 44(2): 275–299.

Faist T. (2000). *The Volume and Dynamics of International Migration and Transnational Social Spaces*. Oxford: *Oxford* University Press.

Fawcett J. (1989). Networks, Linkages and Migration Systems. *International Migration Review* 23(3): 671–680.

Fihel A., Kaczmarczyk P. (2009). Migration: A Threat or a Chance? Recent Migration of Poles and Its Impact on the Polish Labour Market, in: K. Burrell (ed.), *Polish Migration to the UK in the 'New' European. Union After 2004*, pp. 23–48. London: Routledge.

García A.I. (2018). Economic Remittances, Temporary Migration and Voter Turnout in Mexico. *Migration Studies* 6(1): 20–52.

Garip F. (2012). An Integrated Analysis of Migration and Remittances: Modeling Migration as a Mechanism for Selection. *Population Research and Policy Review* 31(5): 637–663.

Garip F., Curran S. (2010). Increasing Migration, Diverging Communities: Changing Character of Migrant Streams in Rural Thailand. *Population Research and Policy Review* 29: 659–685.

Garip F., Eskici B., Snyder B. (2015). Network Effects in Migrant Remittances: Evidence from Household, Sibling and Village Ties in Nang Rong, Thailand. *American Behavioral Scientist* 59(9): 1066–1082.

Glytsos N.P. (2002). The Role of Migrant Remittances in Development: Evidence from Mediterranean Countries. *International Migration* 40(1): 5–26.

Górny A., Śleszyński P. (2019). Exploring the Spatial Concentration of Foreign Employment in Poland under the Simplified Procedure. *Geographia Polonica* 92(3): 331–345.

Haberkorn G. (1981). The Migration Decision-Making Process: Some Social-Psychological Considerations, in: G. De Jong, R. Gardner (eds), *Migration Decision Making: Multidisciplinary Approaches to Microlevel Studies in Developed and Developing Countries*, pp. 252–278. New York: Pergamon Press.

Harris J.R., Todaro M. (1970). Migration, Unemployment and Development: A Two-Sector Analysis. *American Economic Review* 60(1): 126–142.

Heffner K. (1999). The Return of Emigrants from Germany to Upper Silesia: Reality and Prospects, in: K. Iglicka, K. Sword (eds), *The Challenge of East–West Migration for Poland*, pp. 168–205. London: Palgrave Macmillan.

Heffner K., Solga B. (2013). Features of a Migration Region: An Analysis Using the Example of the Opolskie Voivodship. *Bulletin of Geography. Socio-Economic Series* 20: 43–58.

Heffner K., Solga B. (2017). International Migration and Population Decline in the Regions with National Minorities in Poland on the Example of Opolskie Voivodeship. *Region and Regionalism* 13(2): 11–26.

Heffner K., Klemens K., Solga B. (2019). Challenges of Regional Development in the Context of Population Ageing. Analysis Based on the Example of Opolskie Voivodeship. *Sustainability* 11(19): 5207–5230.

Hojman D.A., Szeidl A. (2008). Core and Periphery in Networks. *Journal of Economic Theory* 139(1): 295–309.

Iammarino S., Rodriguez-Pose A., Storper M. (2019). Regional Inequality in Europe: Evidence, Theory and Policy Implications. *Journal of Economic Geography* 19(2): 273–298.

Jasso G., Rosenzweig M.R. (1995). Do Immigrants Screened for Skills Do Better than Family Reunification Immigrants? *International Migration Review* 29(1): 85–111.

Kandel W., Massey D.S. (2002). The Culture of Mexican Migration: A Theoretical and Empirical Analysis. *Social Forces* 80(3): 981–1004.

Kapur D., McHale J. (2012). Economic Effects of Emigration on Sending Countries, in: M.R. Rosenblum, D.J. Tichenor (eds), *Oxford Handbook of the Politics of International Migration*, pp. 131–152. Oxford: Oxford University Press.

Keles R. (1985). The Effects of External Migration on Regional Development in Turkey, in: R. Hudson, J. Lewis (eds), *Uneven Development in Southern Europe: Studies of Accumulation, Class, Migration and the State*, pp. 54–75. London: Routledge.

King R. (2018). Is Migration a Form of Development Aid Given by Poor to Rich Countries? *Journal of Intercultural Studies* 39(2): 114–128.

King R., Strachan A., Mortimer J. (1986). Gastarbeiter Go Home: Return Migration and Economic Change in the Italian Mezzogiorno, in: R. King (ed.), *Return Migration and Regional Economic Problems*, pp. 8–68. London: Routledge.

Klagge B., Klein-Hitpaß K. (2010). High-Skilled Return Migration and Knowledge-Based Development in Poland. *European Planning Studies* 18(10): 1631–1651.

Kubiciel-Lodzińska S., Maj J. (2021). High-Skilled vs Low-Skilled Migrant Women: The Use of Competencies and Knowledge. Theoretical and Political Implications: An Example of the Elderly Care Sector in Poland. *Journal of International Migration and Integration* 21: 1551–1571.

Kushnirovich N. (2019). Labor Market Integration of Skilled Immigrants. *Journal of International Migration and Integration* 20(4): 1055–1070.

Lamela C., Pérez-Caramés A., Fernández-Suárez B. (2012). The Effect of Networks on the Selection of Migrants and Destinations: Colombians in Galicia (Spain). International Migration 50(6): 83–108.

Lee E. (1966). A Theory of Migration. *Demography* 3: 47–57.

LeSage J.P., Ha C.L. (2012). The Impact of Migration on Social Capital: Do Migrants Take Their Bowling Balls with them? *Growth and Change* 43(1): 1–26.

Levitt P. (1998). Social Remittances: Migration Driven Local-Level Forms of Cultural Diffusion. *International Migration Review* 32(4): 926–948.

Levitt P., Lamba-Nieves D. (2010). 'It's Not Just About the Economy, Stupid': Social Remittances Revisited. *Migration Information Source*, 21 May. https://www.migrationpolicy.org/article/its-not-just-about-economy-stupid-social-remittances-revisited (accessed 2 April 2024).

Lewis J.R. (1986). International Labour Migration and Uneven Regional Development in Labour Exporting Countries. *Tijdschrift voor Economische en Sociale Geografie* 77(1): 27–41.

Łukaszewska-Bezulska J. (2021). The Role of Social Capital in Labour-Related Migrations: The Polish Example. *Journal of International Migration and Integration* 22(3): 949–966.

Massey D. (1999). Why Does Migration Occur? A Theoretical Synthesis, in: C. Hirschman, P. Kasinitz, J. DeWind (eds), *The Handbook of International Migration: The American Experience*, pp. 4–52. New York: Russell Sage Foundation.

Massey D.S., Arango J., Hugo G., Kouaouci A., Pellegrino A., Taylor J. (1994). An Evaluation of International Migration Theory: The North American Case. *Population and Development Review* 20(4): 699–751.

Mattoo A., Neagua I.C., Özden C. (2008). Brain Waste? Educated Immigrants in the US Labor Market. *Journal of Development Economics* 87(2): 255–269.

Myrdal G. (1957). *Economic Theory and Under-Developed Regions*. London: Gerald Duckworth & Co.

Naerssen T. van, Spaan E., Zoomers A. (2008). *Global Migration and Development*. New York, London: Routledge.

Newbold K.B. (2020), The New Economic Geography in the Context of Migration, in: M. Fischer, P. Nijkamp (eds), *Handbook of Regional Science*, pp. 1375–1384. Berlin, Heidelberg: Springer.

Nijkamp P., Abreu M. (2009). Regional Development Theory. *International Encyclopedia of Human Geography* 9: 202–207.

Nijkamp P., Poot J. (1998). Spatial Perspectives on New Theories of Economic Growth. *The Annals of Regional Science* 32: 7–37.

Palloni A., Massey D.S., Ceballos M., Espinosa K., Spittel M. (2001). Social Capital and International Migration: A Test Using Information on Family Networks. *American Journal of Sociology* 106(5): 1262–1298.

Passaris C. (1989). Immigration and the Evolution of Economic Theory. *International Migration* 27(4): 525–542.

Piché V. (2013). Les Théories Migratoires Contemporaines au Prisme des Texts Fondateurs. *Population* 68(1): 141–164.

Prebisch R. (1950). *The Economic Development of Latin America and Its Principal Problems.* Lake Success, New York: United Nations Department of Economic Affairs.

Pries L. (1999). New Migration in Transnational Spaces, in: L. Pries (ed.), *Migration and Transnational Social Spaces*, pp. 1–35. New York: Routledge.

Pries L. (2006). *Transnational Migration: New Challenges for Nation States and New Opportunities for Regional and Global Development*. Reports & Analyses 1/06. http://pdc.ceu.hu/archive/00004803/01/rap_i_an_0106a.pdf (accessed 2 April 2024).

Rokita-Poskart D., Mach Ł. (2019). Selected Meso-Economic Consequences of the Changing Number of Students in Academic Towns and Cities. A Case Study of Poland. *Sustainability* 11: 1–15.

Roos C. (2021). Compensating for the Effects of Emigration. Eastern Europe and Policy Response to EU Freedom of Movement. *Journal of European Public Policy* 30(1)*:* 174–192.

Skeldon R. (1997). *Migration and Development: A Global Perspective*. New York: Routledge.

Solga B. (2013). *Miejsce i znaczenie migracji zagranicznych w rozwoju regionalnym*. Opole: Politechnika Opolska.

Solga B. (2014). The Importance of International Return Migration in the Rural Development. *Studia Regionalia* 39: 101–112.

Solga B. (2015). Einfluss der Auslandsmigration auf die Entwicklung der Regionen in Polen, in: *G. Jelitto-Piechulik,* M. Jokiel, M. Wójcik-Bednarz (eds), *Grenzüberquerungen und Migrationsbewegungen. Fremdheits- und Integrationserfahrungen in der österreichischen, deutschen, schweizerischen und polnischen Literatur und Lebenswelt, pp. 47–59. Vienna:* LIT-Verlag.

Solga B., Kubiciel-Lodzińska S. (2017). Poland: Immigration Instead Of Emigration. Transformation of the Mobility Model. *Sustainable Economic Development, Innovation Management and Global Growth* 1(9): 797–811.

Stark O., Taylor J.E. (1991). Migration Incentives, Migration Types: The Role of Relative Deprivation. *The Economic Journal* 101(408): 1163–1178.

Stenning A., Dawley S. (2009). Poles to Newcastle: Grounding New Migrant Flows in Peripheral Regions. *European Urban and Regional Studies* 16(3): 273–294.

Stephen L. (2007). *Transborder Lives: Indigneous Oaxacans in Mexico, California, and Oregon*. Durham: Duke University Press.

Stough R.R. (2001). Endogenous Growth Theory and the Role of Institutions in Regional Economic Development, in: B. Johansson, C. Karlsson, R. Stough (eds), *Theories of Endogenous Regional Growth,* pp. 17–48. Berlin, Heidelberg: Springer.

Taylor J.E. (1999). The New Economics of Labour Migration and the Role of Remittances in the Migration Process. *International Migration* 37(1): 63–88.

Tienda M., Raijman R. (2004). Promoting Hispanic Immigrant Entrepreneurship Chicago. *Journal of Development Entrepreneurship* 9(1): 1–21.

Van Hear N., Bakewell O., Long K. (2018). Push-Pull Plus: Reconsidering the Drivers of Migration. *Journal of Ethnic and Migration Studies* 44(6): 927–944.

Vertovec S. (2009). *Transnationalism*. London, New York: Routledge.

Vogler M., Rotte R. (2000). The Effects of Development on Migration: Theoretical Issues and New Empirical Evidence. *Journal of Population Economics* 13(3): 485–508.

Wallerstein I. (1997). *The Capitalist World Economy*. *Cambridge*: Cambridge University Press.

White A., Grabowska I. (2019). Social Remittances and Social Change in Central and Eastern Europe: Embedding Migration in the Study of Society. *Central and Eastern European Migration Review* 8(1): 33–50.

Ziltener P. (2006). *Das regionale Migrationsmuster Ostasiens*. Bochum: Ruhr-Universität Bochum.

Zong J., Batalova J. (2018). Mexican Immigrants in the United States. *Migration Information Source*, 11 October. https://www.migrationpolicy.org/article/mexican-immigrants-united-states (accessed 2 April 2024).

How to cite this article: Heffner K., Solga B. (2024). The Emigration-Region Concept, Emergence Mechanism and Characteristics: A Case Study of the Opolskie Voivodeship. *Central and Eastern European Migration Review* 13(1): 129–149.

Central and Eastern European Migration Review
Received: 20 February 2023, Accepted: 15 February 2024
Published online: 12 March 2024
Vol. 13, No. 1, 2024, pp. 151–168
doi: 10.54667/ceemr.2024.01

Subjective Well-Being between the Migration Experience of Returnees and the Country Effect: An Integrated Approach on European Spaces

Dumitru Sandu*

How is the well-being of returnees when considered from the point of view of the migration experience abroad? To answer this question, the first hypothesis considers that returnees differ in the function of the key activity they had abroad – working, studying or living there without working or studying. Secondly, even if one maintains constant socio-demographic profiles, the country of return counts. Thirdly, it depends also on the facet of subjective well-being (SWB) that is considered – the happiness of living in a certain country of the European Union or a person's satisfaction with life, country, public services or income. The results of the multivariate analysis indicate that experience of migration, country of current residence and facets of SWB all count. Returnees – through their experience of migration abroad – are compared to non-migrants. The answers come from analysing data from a large Eurobarometer survey in the European Union. Multivariate regression and cluster analysis are the main data-processing procedures. The stability of the results is tested by sensitivity analysis.

Keywords: return migration, migration experience, subjective well-being, comparative analysis, European Union

* University of Bucharest, Romania. Address for correspondence: dumitru.sandu@gmail.com.

Introduction

The voluntary return of migrants to the place of departure appears to be, in the neoclassical approach to migration (Massey, Arango, Hugo, Kouaouci and Pellegrino 1999), a marker of failure in the individual migration project or the effect of reducing the development gaps between origin and destination (de Haas, Fokkema and Fihri 2015). Those who failed at their destination – or those who found that the gap between the two points of the migration route has since narrowed – return back to the departure communities. The return is theorised completely differently in the new economy of migration, oriented as it is towards migration as a family phenomenon (Massey *et al.* 1999). This appears to be more of a success – as an accumulation of resources, as planned at departure, to justify the return. In both variants of the approach, the targets of emigration are, mostly, economic gain, social gain (education, family reunification) or cultural (lifestyle, for example). The interpretation is controversial because the simultaneous testing of the two theories is rarely carried out. Consequently, there is a tendency to give credit to both theories, depending on the context, of the initial motivation for migration (de Haas *et al.* 2015).

Regardless of the nature of the migration targets – goods, values, behaviours, relationships – success or failure translate into dichotomies of subjective well-being (SWB), satisfaction–dissatisfaction, positive–negative feelings and happiness–unhappiness (Gruber and Sand 2022). The state of contentment–dissatisfaction and perceived opportunities can manifest themselves in different spheres of life (income from employment, human capital, personal networks, living environments), in connection with different experiences of migration or residential stability (Sandu, Toth and Tudor 2018). However, subjective well-being variables – structured more cognitively, such as life satisfaction, or affectively, such as happiness – and different positive or negative feelings, all play the role of intermediate variables, of direct influence on different forms of the decision on migration or stability (King and Kuschminder 2022; White 2022).

Usually, analyses of the relationship between migration and SWB are centred on subjective well-being that precedes emigration or that resulting from migration but within the destination country (Hendriks and Bartram 2019). A special case which could be of particular interest to our approach is that of considering the SWB of immigrants compared to non-migrants in the origin country. A good example of such an approach is the research that Gruber and Sand (2022) did on older intra-European immigrants using data from several waves of the Survey of Health, Aging and Retirement in Europe. They compared immigrants with remainers in the country of origin and found that the tendency was for immigrants to have higher levels of SWB compared to those who remained in the home countries.

The form of migration of interest in this analysis is, however, return migration to the place of origin. The research question I am asking relates to the consequences of return migration on subjective well-being in living spaces in the European Union. The topic is very little addressed in the literature on return migration, in which the emphasis is more on the motivations for returning (Bilecen 2022; King 2018; King, Moroşanu, Jakobson, Schmidt, Miah, Vetik and Money 2022; Sandu *et al.* 2018) or on the skills gained through migration (Croitoru 2020; Hagan and Wassink 2020; Janta, Jephcote, Williams and Li 2021). Here, I am particularly interested in perceiving, in terms of subjective well-being, the country of return as a country of current residence for returning migrants compared to non-migrants. Generally, migration destination studies are much more frequent than those that are focused on migrants' origin countries. Are returning migrants more satisfied or happier than locals with no experience of migration abroad? Do the different experiences of migration in the former destination country – related to work, education or companionship – have similar or different effects on SWB? What are the effects of return migration on the SWB in the origin countries, after return, if I compare non-migrants with returnees and their different forms of migration abroad, while controlling for place and demographic variables? This is the basic research question which I address. The dominant approach in the literature has

dealt with the effects of returning to the origin country, regardless of the returnees' experience of migration abroad. The generic hypothesis from which I start is that, in fact, the form of migration experience abroad also matters as a specific facet of subjective well-being. The expectation is based on the finding that the different defining variables for SWB, although interrelated, frequently have mutual relations of relative independence (Diener, Oishi and Tay 2018; Ruggeri, Garcia-Garzon, Maguire, Matz and Huppert 2020). In addition, it is expected that, in the return equation, the level of the decision to return also mattered – as did the consequences of the return in the form of migration experience in the host state. It is expected that migrations for work, education, companionship, lifestyle or combinations thereof will have different effects on SWB upon return to the country of origin, depending on the context. The next section covers the somewhat few approaches to the relationship between return migration and SWB before presenting the methodological premises of this research.

The subjective well-being of returnees

The key lines of structuring these approaches are the dichotomies between comparative and non-comparative studies, an interest in SWB *per se* versus some of its specific components (happiness, satisfaction etc.), considering all types of returnees versus considering only specific segments of them and qualitative versus quantitative studies. Cases of life satisfaction/SWB as a dependent variable – but returnees are not a term of reference in the comparison and the reference is only to natives, stayers and immigrants (Voicu and Vasile 2014) – are not included in this analysis. Here are some examples of approaches where SWB is considered as an outcome of return migration.

Galván *et al*. (2023) developed a qualitative approach starting from 12 interviews with Mexican returnees from the USA. The returnees were satisfied with their pro-social behaviour of helping their families and friends at home and with the language skills and job experience they acquired abroad. Dissatisfaction was also mentioned in the subjective mix of their perceptions of return. Such findings are a good basis, the authors of this article feel, for questioning the idea that, every time, returning home should be considered a sign of failure.

Multiple comparisons between current migrants abroad, returnees and stayers were developed using data collected in 2010 and 2011 on older people in 5 regions of Turkey (Baykara-Krumme and Platt 2018). It is not known how representative the sample of 1,019 persons might be. Current migrants abroad are experiencing a medium level of life satisfaction that is higher than that of stayers or returnees. Income, health and social networks explain a significant percentage of the differences in life satisfaction among current migrants, returnees and stayers.

Grabowska and Jastrzebowska (2023) analysed the effect of Polish returnees' migration experience abroad on their informal human capital by comparing stayers and returnees. The variables included job satisfaction, life satisfaction and soft skills in the broader concept of informal human capital. The finding is that the informal human capital of returnees is higher, compared to that of stayers and such a migration resource could be used by organisations. The authors also conclude that informal human capital is equally differentiated by the former destination country. The net effect of the former destination country is not determined by controlling for demographics like age, gender, occupation, education etc. Next, I present the methodological premises for the research and, subsequently, the results and conclusions.

Data and method

The approach with which I start argues that SWB is a self-estimation of one's own life – from perspectives dominated by knowledge, as in the case of satisfaction with life or by feelings or combinations thereof and as

in the case of happiness – on specific spheres of life or as a whole. As in demography, however, I distinguish between events, actions, processes or structures associated with SWB and migration. Using mainly survey data at the European level, I adopt the SWB perspective as a social phenomenon consisting of the aggregation of events of contentment–dissatisfaction or happiness–unhappiness concerning a person's life, occupation, public services or country of current residence. Such phenomena of subjective well-being can be traced not in their dynamics at the level of the individual but by categories of factors of conditioning of gender, age, education, residential environment, country of residence, skills in using the Internet, way of reporting to the institutions of the national society of countries of residence, the experience of migration abroad, etc.

The multiple comparisons that I make in order to understand the relationship between the subjective well-being of returning migrants and their experiences of migration abroad will be made, starting not from qualitative data (Galván *et al*. 2023) but from the data from the standard Eurobarometer 89.1 survey, conducted in March 2018 (EB89). Although the Covid-19 pandemic of 2019–2022 that followed very probably changed such relationships, it is important to have a first picture of them before the pandemic.

Concerning the main independent variable of interest, each of the interviewees was asked if s/he had worked, studied or lived abroad. More specifically, the subjects were asked three questions: whether or not they had personally 'benefited' from working, from studying or from living in another EU country. The intersection of these responses resulted in a typology with 5 categories (Table 1). Around 72 per cent of those surveyed (15+ years old) did not have any experience of returning from abroad (i.e. from another EU country) to their EU home country. Those who studied and worked abroad and then returned represented about 15 per cent of all interviewees. This is followed, in descending order, by those who had worked abroad (7 per cent), those who had studied abroad (4 per cent) and those who had lived in another country, probably accompanying other migrants in the family (2 per cent).

Table 1. Migration experience abroad and agreement with the statement 'You are happy living in … country'

Migration experience		Happy to be born in the country of current residence (%)					Total as % by	
		Very unhappy	Unhappy	Do not know	Happy	Very happy	Row	Column
Non-returnees	Stayers	2.1	**5.6**	1.0	39.7	51.6	100.0	71.5
Returnees with migration experience of ...	Living abroad	2.2	10.4	1.3	38.6	**47.6**	100.0	2.4
	Study	1.8	9.6	**0.5**	**36.7**	51.3	100.0	3.8
	Work	2.6	8.0	1.2	38.5	49.7	100.0	7.0
	Work & study	**1.4**	**4.6**	1.0	40.9	52.1	100.0	15.3
Total		2.0	5.9	1.0	39.7	51.4		100.0

Data source: Eurobarometer 89.1, March 2018 (EB89).

Notes: Shadow cells for a positive association between the row and column values and bold figures for negative associations, as indicated by adjusted standardised residuals (not indicated here), for p<=0.05. Example: 47.6 per cent of the people who lived abroad while accompanying other family members were not very happy with living in the country of return. No category of returnees is significant, happy or very happy with their residence country. N=27,988.

If I intersect these categories of people, identified by their migration experience, with the main categories of people, depending on their happiness about living in their country of current residence, I find that the unhappiness related to the country is specific to those who have returned. If I abstract other demographic characteristics of the interviewees – age, gender, matrimonial situation, education or residence environment – I find that those who are happy with the country in which they live do not seem to be associated with the experience of migration abroad. In other words, in the EU as a whole, those who have returned to the country of origin tend to be rather unhappy. The exception is those who have worked and studied abroad – they do not seem to be unhappy.

In which countries did returnees live who were predominantly unhappy about the country? If I introduce in the analysis, through multivariate multiple regression (as in Table 2) demographic specifications related to age, gender, education and residential environment, for example, are the relationships in Table 1 maintained? Through such a procedure I am testing whether the bivariate relations of significance from Table 1 are maintained if associated with other predictors of the migration experience. This is also a way to test whether the migration abroad experience is a powerful predictor for subjective well-being even after introducing other control variables.

I measure the subjective well-being of the returnees through indicators related to the perception of the country in which those interviewees lived (happy to live in that host country, satisfaction with the country, satisfaction with public services), to their satisfaction with their own life and with the level of income in the household. All 5 indicators are equally coded, with direct scaling, with a score of 1 for maximum dissatisfaction/unhappiness and 4 for maximum satisfaction/happiness. All 5 SWB indicators are subsumed to the same latent variable in the case of factor analysis (KMO index is 0.75, indicating that about three-quarters of the observed variables are explained by the latent factor). To be able to reconstruct the complex relationships between SWB on the one hand and the environment and life experience of those interviewed, on the other, I opted for maintaining subjective well-being indicators as dependent variables in regression patterns. The option starts from the finding that, although independent, SWB indicators have, in some cases, relatively independent variation (Diener *et al.* 2018).

To facilitate comparisons between the different facets of SWB, I opted not for 5 multiple regression equations but for a single multivariate regression equation, with 5 dependent variables and 12 predictors (see the syntax of the equation in the footnote to Table 2). The choice of multivariate regression allows for easier computing and multiple comparisons by computing tests for different pairs of coefficients of regression (UCLA n.d.).

Where possible I preferred to encode predictors as nominal-type variables. This is the case for migration experience abroad, education, age groups, categories of localities of current residence and countries of habitation. The option is given in the expectation that there will be non-linear relationships between the predictor and the dependent variables (for specifications related to how to measure the analysis variables, see Table 2). The migration experience abroad, for example, could be encoded dichotomously, noting with 1 the fact of having lived, worked or studied in another country of the European Union or with 0, the lack of migration experiences abroad, in the sense already mentioned above. Instead of such a dichotomous predictor, I preferred to operate with a typology already presented in Table 1. It has been entered as a nominal variable in the equations for predicting SWB variables, considering the category of those with no experience of emigration to other EU countries as a benchmark.

Similarly, I considered the country of current residence at the time of the survey as a nominal variable, with 28 values corresponding to the country of residence in March 2018. After several experiments, to avoid the unwanted phenomenon of interlinkage between independent variables (multi-colinearity), I considered as a reference value

the fact of living either in France or in one of the four smaller EU countries for which the sub-samples were very small (Malta, Republic of Cyprus, Luxembourg and Estonia).

Subsequently, after running the regressions with the mentioned variables, I deepened the analysis by identifying the cultural models of the country's impact on SWB. I have characterised the SWB impact profile of each of the countries of current residence included in the analysis through a series of 5 values of the regression coefficients estimating the specific impact of each country on the SWB variable and the 5 probabilities associated with the regression coefficients as measures of the observed significance of the coefficients. Subsequently, on the matrix of 23 countries and the 10 columns taken from the regression models, I applied a cluster analysis model. The result was the dendrogram shown in Figure 1. Based on that graphic, I determined the 7 groupings of countries with similar impacts on SWB variables. For the rest of the technical details, see the footnote in Figure 1 in the section on the country effect. To see the specific causal profile for each of the country groupings, I built a new variable through which I replaced the reference country as a predictor with the grouping of countries resulting from the cluster analysis. The results of this new regression analysis allowed us to characterise the cultural specificity of the group in influencing SWB.

The first hypothesis from which I started (H1) claims that SWB, *caeteris paribus*, tends to be higher for those who have had the double experience of studying and working abroad. The expectation is based on the premise that, at the level of the respective group, the accumulations of possible utility after returning to the country of origin were higher on human, material and cultural capital. With such accumulations, they were able to get more rewards on the comeback, with a direct positive impact on SBW. The reference term in the structuring of H1 was those with no experience abroad.

The second hypothesis (H2) holds that the SWB model, *caeteris paribus*, tends to be specific to groupings of countries with similar economic development and immigration and located in the territorial vicinity. Status and share capital variables are considered to be control variables and are expected to have differentiated relationships with SWB. To test the stability of the regression and cluster models I worked with, I also adopted the idea of a sensitivity analysis. Based on a factor analysis, I reduced the 14 status variables to 7 (Table A1, in the Appendix). One of the factors with the highest consistency, for example, is given by the group that includes young people of 15–34 years, those still in school and those who are not married. Similarly, another grouping is formed with the two variables relating to institutional trust – namely trust in government and parliament – that goes together with trust in central and local government. Reduced models with fewer socio-demographic variables work in a similar way to extended models in which SWB predictors are dependent on multiple predictors. In the results section I comment on these issues in more detail. Next, I present the effects of the migration experience, the country profile and the status situation on the 5 dependent variables that measure SWB.

The effect of the migration experience abroad

At first glance, the experience of migrating abroad does not affect the migrants' happiness at living in the country of current residence. In the Eurobarometer survey data, 91 per cent of returnees from other EU countries say they are happy to have been born there. The percentage of happy people, for the same reason, is identical for those who have not lived in other EU countries. The long-term evaluations reflected by the life satisfaction indicator are different. From this point of view, returning migrants tend to be more satisfied (86 per cent), compared to non-migrants (82 per cent satisfied with their own lives).

If I follow the same relationships but introduce multiple control variables (those in Table 2), I find that the fact of having lived abroad in the EU, for whatever reason, is equally unimportant for the state of happiness/unhappiness about the country of residence at the time of the survey. In other words, the experience

of migration outside the country of current residence does not matter (the calculation results are not presented here). Returning migrants tend to be more satisfied with their own lives than non-migrants in the multivariate regression analysis, using the control variables in Table 2. It follows from the same type of multivariate analysis that migrants returning to European countries from other EU countries tend to be more satisfied than non-immigrants in terms of satisfaction with the country of current residence, public services and the level of household income.

However, if I introduce into the equation not the simple fact of being or not being a return migrant but a typology that differentiates between different categories of migration experiences abroad (working, studying or living there, without having been employed or studying), how do the effects on SWB occur? As I will see, the picture is very different.

For all 5 forms of SWB considered in the analysis, consistent with H1, a positive effect of having worked and studied abroad was recorded (Table 2). Of course, the effect of the migration experience is noticeable, especially concerning those who have not been abroad at work, for studies or as companions. The prediction pattern, from this point of view, differs, however, depending on the type of subjective well-being. In personal reporting through satisfaction with life or satisfaction with income in a household, migration experiences abroad seem to matter less. The only facet that matters significantly and positively, as I have already mentioned, is that relating to the accumulated experience of working and studying abroad.

Returnees who have worked abroad tend to have conflicting reporting. They seem to be satisfied, in general, with the country in which they live (the home country) but not happy that they were born there. I do not know, from the data I am working with, whether differentiated reporting derives from the difference between satisfaction and happiness or from the fact that happiness is an assessment in which the country of origin is compared to other countries and in the satisfaction assessment that comparison is probably less present. A similar situation is found for those who have been abroad simply to accompany migrants, without employment or study targets. They tend to be satisfied with the country of return but unhappy that they live there. As with the experience of working abroad, the difference in the comparative or non-comparative assessment of the country seems to matter, in the sense that the comparative assessment that I associate, hypothetically, with happiness, seems to be more demanding, while the non-comparative assessment related to satisfaction with the country could be less demanding.

For those who have studied abroad and returned to their country of origin, I only have an effect of increased satisfaction with public services and, in general, with the country of return. Otherwise, the strictly personal effect, on satisfaction with life or household income does not seem to be significant.

Is the configuration of the impact that migration experiences have on SWB maintained also when I move on to the low analysis model in which socio-demographic predictors are reduced by factorial regrouping (compare Table 2 with Table A2, in the Appendix)? In essence, yes. Those unhappy with the country where they live (the home country of residence), in both versions of the calculation, are mainly those who have worked abroad and those who accompanied them, without working or studying. Similarly, those who have worked and studied abroad tend to be satisfied, as a trend, in both variants of calculation. Only 1 difference arises in the explanation of happiness related to the country in which those interviewed live. In the extended model, the effect is significant and positive and in the restricted model the number of predictors is insignificant.

Is there still a country effect if I control, through analysis procedures (multivariate regression), for both the role of the migration experience and that of the socio-demographic status? I try to answer this question in the section that follows.

Table 2. Predictors of happiness and satisfaction in European Union countries, full model

Predictors		y1. Happy to live in residence country		Degree of satisfaction (1=minimum, 4=maximum) with ...							
				y2. Country of residence		y3. Public services		y4. Own life		y5. Income in the household	
		b	p	b	p	b	p	b	p	b	p
x1. Experience abroad of the returnee (ref. Non-migrant)	Accompany*	**–0.116**	**0.000**	0.094	0.000	0.021	0.451	–0.039	0.133	0.033	0.184
	Study*	–0.027	0.200	0.173	0.000	0.100	0.000	0.026	0.199	0.033	0.098
	Work*	**–0.056**	**0.001**	0.072	0.000	0.007	0.686	0.011	0.495	0.002	0.894
	Work & study*	0.028	0.023	0.134	0.000	0.129	0.000	0.053	0.000	0.086	0.000
x2. Age (ref. 50–64 years)	15–34*	**–0.063**	**0.000**	0.081	0.000	0.089	0.000	0.132	0.000	0.097	0.000
	35–49*	–0.015	0.195	0.027	0.012	0.045	0.000	0.052	0.000	0.054	0.000
	65*	0.081	0.000	–0.005	0.671	0.002	0.877	0.046	0.000	0.075	0.000
x3. Man		–0.014	0.096	0.048	0.000	0.035	0.000	**–0.032**	**0.000**	0.031	0.000
x4. High frequency of using the net*		0.001	0.631	0.004	0.100	–0.003	0.250	0.027	0.000	0.029	0.000
x5. Level of education (ref. Middle/low)	*High*	0.002	0.806	0.022	0.016	–0.010	0.317	0.049	0.000	0.078	0.000
	Still studying*	0.017	0.367	0.031	0.071	0.068	0.000	0.092	0.000	0.006	0.706
x6. Married*		0.022	0.015	0.048	0.000	–0.005	0.554	0.101	0.000	0.068	0.000
x7. Difficulty paying bills in last year		**–0.154**	**0.000**	**–0.061**	**0.000**	**–0.035**	**0.000**	**–0.278**	**0.000**	–0.435	0.000
x8. Subjective social class		0.011	0.000	0.013	0.000	0.011	0.000	0.038	0.000	0.052	0.000
x9. Residence (ref. Town)	City*	–0.011	0.307	0.008	0.402	0.014	0.194	**–0.020**	**0.041**	–0.026	0.008
	Village*	0.052	0.000	0.027	0.003	–0.008	0.442	0.032	0.001	0.020	0.027
x10. Political trust (in parliament and government – factor score)		0.074	0.000	0.216	0.000	0.029	0.000	0.024	0.000	0.024	0.000
x11. Trust in administration (central and local – factor score)		0.117	0.000	0.185	0.000	0.402	0.000	0.172	0.000	0.171	0.000
Constant		3.451	0.000	2.169	0.000	2.396	0.000	2.755	0.000	2.442	0.000
R2 full model		0.184		0.442		0.365		0.298		0.321	
R2 without country as predictor		0.118		0.370		0.330		0.241		0.293	

Data source: Eurobarometer 89.1, March 2018 (EB89).

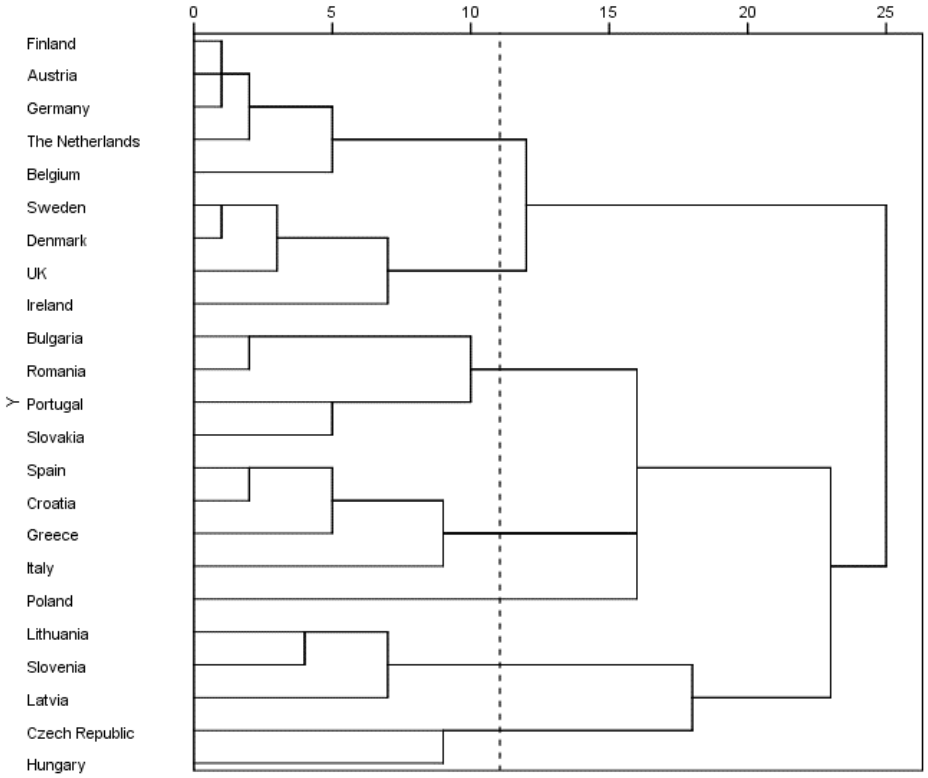
Notes: Results of multivariate multiple regression. b = regression coefficient, p = significance level. Small countries – Cyprus, Malta, Estonia and Luxembourg – are not included. France is also omitted as a reference country, to avoid multicollinearity in tests of the multivariate regression. Coefficients for the 23 countries of residence are not presented here. The sintax for multivariate regression in STATA17 is: mvreg y1 y2 y3 y4 y5= i.x1 i.x2 x3 x4 i.x5 x6 x7 x8 i.x9 x10 x11 i.x12 [aweight=w23]. The significance for dependent and independent variables is given in the table and the letter i marks categorical variables. x12 is for country as categorical variable (see Table 3). w23 is the weighting variable as provided in the public data file of Eurobarometer. Country happiness is tested by a question on the agreement with the statement 'You are happy living in … (reference country)'. The answers for all the dependent variables are recorded by direct scaling: 1 fully disagree … 4 fully agree, with the positive statement for all the 5 SWB components. * Dummy variable. Shadow marks the positive regression coefficients that are significant for p<=0.001. Negative regression coefficients for p<=0.001 are in bold figures. Shadow and bold are used to make evident the probable relations of maximum intensity. N=23,577. R2 without migration experiences as predictors is slightly lower than for the full model, with .001 or .002. The reference category for migration abroad experience, for example, is the category of non-migrants, as specified in the table. Education and subjective social class could be endogeneous variables, affected by SWB and migration experience abroad, which is why we ran the same model without the referred variables. R2 modifications are very small, only to the third decimal of R2. One can infer by this sensitivity analysis that the model is quite stable, not so much affected by small changes in the equation. Practically, the coefficients in the regression models without education and subjective social class keep the same significance pattern as in the models presented in Table 2. This is clear proof of the fact that the results of this analysis are not modified by slight methodological changes. The statistical experiment proves, also, the fact that the models are not affected by endogeneity.

Country effect

The country of current residence counts, differentiated in intensity and meaning, in influencing the SWB, whether they are considered independent EU countries or groupings. This is the first analysis in the field when the country's impact on SWB is no longer determined by averages of subjective welfare indicators but by the net or specific effect of these countries at the level of a multivariate regression analysis. In other words, the classification or grouping of countries is carried out in terms of their specific impact on SWB and not by calculating averages of dependent variables at the country level.

I introduce each of the groupings of countries and their specific prediction profile in Table 3. The groupings of countries are structured, to a large extent, according to the H2 hypothesis. Immigration countries appear in the first two groups, at the top of the graph in Figure 1.

Figure 1. Similarities between countries by their specific impact on the 5 items of subjective well-being, starting from full model regressions



Data source: Eurobarometer 89.1, March 2018 (EB89).

Notes: Results of hierarchical cluster analysis, furthest neighbour, correlation coefficients as measures of similarity, standardisation of clustering variables by z scores. Input data come from the 5-regression equation presented in Table 2. The causal profile for each of the 23 considered countries is given by the regression coefficients predicting the values of the 5 SWB indicators in the multivariate regression, with the 18 predictors that are specified in Table 2, plus the 23 residence countries from the EU (reference term – four small countries and France) and also the significance probabilities for each of the dependent variables for the SWB indicators. Example: the highest similarity of causal profiles in influencing SWB at the country level is for samples from the Southern-European countries of Croatia, Spain, Italy and Greece. The most heterogeneous cluster includes Romania, Portugal, Slovakia and Bulgaria. The last two statements are based on the mean values of Silhouette coefficients that were computed for each country and cluster. The mean value for the Silhouette coefficients is 0.421. The closer this value is to 1, the more homogeneous the country clusters.

Table 3. Country impact on subjective well-being, keeping under control other factors

Countries by similarity clusters	Happy living in the current residence country		Degree of satisfaction (1=minimum ... 4=maximum) with...							
			... current residence country		... public services in the current residence country		... own life in the current residence country		... income in the current residence country	
	b	p	b	p	b	p	b	p	b	p
Finland	0.081	0.039	0.463	0.000	0.317	0.000	0.073	0.048	0.111	0.002
Austria	0.155	0.000	0.553	0.000	0.358	0.000	0.161	0.000	0.172	0.000
Germany	0.034	0.034	0.380	0.000	0.161	0.000	0.041	0.007	0.098	0.000
Netherlands	0.203	0.000	0.511	0.000	0.590	0.000	0.235	0.000	0.269	0.000
Belgium	**–0.172**	**0.000**	0.249	0.000	0.124	0.000	0.052	0.057	0.067	0.012
Sweden	0.223	0.000	0.375	0.000	0.183	0.000	0.188	0.000	0.243	0.000
Denmark	0.290	0.000	0.506	0.000	0.104	0.011	0.431	0.000	0.346	0.000
UK	0.066	0.000	0.086	0.000	0.045	0.010	0.298	0.000	0.239	0.000
Ireland	0.243	0.000	0.469	0.000	0.016	0.731	0.278	0.000	0.220	0.000
Bulgaria	**–0.340**	**0.000**	–0.055	0.144	–0.074	0.072	**–0.525**	**0.000**	**–0.139**	**0.000**
Romania	**–0.480**	**0.000**	–0.009	0.682	–0.013	0.599	**–0.354**	**0.000**	**–0.106**	**0.000**
Portugal	–0.070	0.027	0.131	0.000	–0.013	0.675	**–0.189**	**0.000**	0.045	0.123
Slovakia	0.019	0.653	**–0.157**	**0.000**	0.000	0.999	**–0.206**	**0.000**	**–0.199**	**0.000**
Spain	–0.030	0.031	**–0.170**	**0.000**	**–0.063**	**0.001**	0.032	0.066	**–0.056**	**0.001**
Croatia	**–0.176**	**0.000**	**–0.130**	**0.001**	**–0.128**	**0.004**	–0.109	0.009	–0.106	0.009
Greece	–0.176	0.000	**–0.418**	**0.000**	**–0.295**	**0.000**	**–0.348**	**0.000**	**–0.191**	**0.000**
Italy	**–0.075**	**0.000**	**–0.083**	**0.000**	**–0.142**	**0.000**	**–0.196**	**0.000**	0.114	0.000
Poland	0.005	0.804	0.271	0.000	0.032	0.123	**–0.073**	**0.000**	**–0.057**	**0.003**
Lithuania	**–0.382**	**0.000**	0.115	0.023	0.204	0.000	**–0.174**	**0.001**	–0.013	0.797
Slovenia	0.065	0.314	0.224	0.000	0.152	0.019	0.146	0.017	0.020	0.743
Latvia	0.025	0.710	0.056	0.365	0.209	0.002	–0.107	0.094	–0.031	0.621
Czech Rep.	**–0.363**	**0.000**	0.369	0.000	0.219	0.000	0.012	0.671	0.060	0.029
Hungary	**–0.774**	**0.000**	0.180	0.000	0.204	0.000	**–0.251**	**0.000**	**–0.135**	**0.000**

Data source: Eurobarometer 89.1, March 2018 (EB89).

Notes: Results of multivariate multiple regression using, also, the predictors from Table 2.b regression coefficient, p significance level. Shadow marks the positive regression coefficients that are significant for p<=0.001. Negative regression coefficients for p<=0.001 are in bold figures. Shadow and bold are used to make evident the probable relations of maximum intensity. Reference values for the country – France, Luxembourg, Cyprus, Malta, Estonia.

I found that the grouping of the Nordic countries (Sweden, Finland, Denmark, Great Britain, the Netherlands), plus Austria, is characterised by generalised satisfaction on all 4 indicators of satisfaction and by declared happiness about living in the country of current residence. The only exception within the grouping is Belgium for which there are positive effects on satisfaction but negative on the happiness of living there.

Why this exception? Additional data are needed for elucidation, which is not available in the survey to which I refer. I also note that the nucleus of maximum causal similarity within this grouping is given by Germany, Austria and Finland (see the graph in Figure 1). Each of the component countries of the group has at least 1 neighbouring country in the class of belonging, as expected, based on the formula in H2.

Close in the causal profile is the grouping of the Nordic countries – Sweden, Denmark, Great Britain and Ireland. It is also specific to them to record positive, statistically significant effects on subjective well-being, as measured in this case. One exception was Ireland, where there is no positive country effect on satisfaction with the quality of public services. The nucleus of similarity of the group consists of the two Scandinavian countries of Sweden and Denmark. Both groups discussed so far are made up of relatively developed countries capable of attracting migrants (H2).

At the opposite pole are countries from the East of the EU (Bulgaria, Romania, Slovakia) plus 1 country from the south of the EU – Portugal. All four of these countries are characterised by their negative impact on life satisfaction. In addition, living in 3 of them – Romania, Bulgaria and Portugal – also has a significant negative impact on happiness related to the country in which the interviewees live. All are countries of emigration.

The countries of Southern Europe – Spain, Croatia, Greece and Italy – are specific to the fact that housing at their level brings, predominantly and significantly, dissatisfaction with public services and the country of current residence. As in previous groupings, one exception appears – Greece. Like the other Southern countries, Greece is marked by negative effects on subjective well-being but not on the happiness of living there. On the contrary, *caeteris paribus*, living in Greece, despite dissatisfaction with life, public services, income or country, is accompanied by the happiness of being born in the environment of that country. It captures the simultaneity of dissatisfaction with the country in contrast to the happiness of living in that country. Why so? As usual, I say that more data are needed to respond. Hypothetically, I can assume that a significant role in this complexity of relations is also played by the climate, the advantages of a country of tourist attraction, etc. I note that the maximum similarity in the group is recorded between Spain and Croatia.

Two of the Central and Eastern European countries – Hungary and the Czech Republic – appear separately in a grouping characterised, essentially, by the positive impact that residency in these countries has on satisfaction with the country and with the quality of public services. Despite these positive effects on satisfaction indicators, residency in the two countries contributes to registering a situation of unhappiness with the country of current residence. Lithuania, Latvia and Slovenia appear in a separate grouping characterised more by the heterogeneity of influences on SWB or by an insignificant impact on different aspects of well-being. Poland appears as a singular country with a weak causal profile. Only dissatisfaction with a person's own life and household income seems to define the impact of residency in this country on SWB.

How stable is this grouping of countries, because of the relationships between predictors and subjective wealth variables? To answer the question, I resumed the cluster analysis starting from the data of the reduced regression model in which I replaced the 14 socio-demographic variables with the factors that regroup them (Table A1, in the Appendix), keeping the other predictors. The expectation is that similarity relations between very similar country profiles will be maintained (the resulting dendrogram in the new calculation is shown in the Appendix, Figure A1). Austria and Germany, for example, remain strongly similar in terms of the impact that housing in those countries has on SWB variables. Such a finding is all the more credible as the two countries are neighbours and have strong cultural similarities. The same is maintained, in both variants of calculation, for the strong similarities of causal profile between the two Scandinavian countries of Denmark and Sweden.

In the category of countries of emigration, a very strong similarity of causal profile between Bulgaria and Romania is maintained. The basis of this stability of similarity is given by the neighbourhood of the two countries of emigration and also by their proximity from the perspective of their low level of development or

quality of life. The Southern countries – Italy, Spain, Greece and Croatia – remain strongly similar in the variant where the input data in the cluster analysis are derived from multiple regression models with a low number of predictors.

The similarity of impact on SWB occurring between the Czech Republic and Belgium is surprising. The two countries are not neighbours and have different migration experiences. Why so? I do not know. In the dendrogram in Figure 1, the Czech Republic appears, naturally, together with Hungary and Belgium, in the proximity of the similarity of some neighbouring countries of immigration (the Netherlands, Germany, Austria and Finland). Poland appears as a single case in Figure 1 and in Figure A1 about the maximum similarity with Slovakia and Latvia. This latter grouping can be more easily explained by the territorial proximity and closer development profiles of the countries in the cluster. On the whole, the two groupings, starting from the regressions with a large number of predictors (complete models) and those derived from regression equations on reduced models, are consistent. As I have pointed out in this last paragraph, grouping differences also occur between the two cluster analyses. Unfortunately, the survey data I work with do not provide essential information for SWB, namely that of personal happiness. When these and similar data can be added to the set of indicators with which I have worked, the previous interrogations will be able to be clarified.

Beyond the migration experiences and the country of residence effect mentioned in the previous sections, SWB is also under the influence of socio-demographic status effects such as those related to age, gender, education, residential environment, marital status, internet use, subjective social class or institutional social capital. In the present analysis, they have the role of control variables, meant to highlight the specific contribution of the variables of interest – the migration experience and the country of current residence in the SWB variation. A brief overview of the effect of these control variables is given in the section that follows.

Status effect

The status variables mentioned act on the SWB independently (Table 2) and in the interaction (Table A2). I shall refer, briefly, to both points. Young people of 15–24 years old tend to be more satisfied, compared to adults aged 50–64, compared to their own life, the income they have in the household, the public services in the country where they live and also the country of current residence. However, they still tend to be more fearless than they are in their country of current residence, regardless of the migration experience they have. This is probably the case, within the EU, because the happiness assessment is constructed, more than that of satisfaction, by multiple references to the situations in other countries. The actual or virtual trips they make abroad help them to see what it is like with social organisations in other countries. The age effect goes together with that of the life cycle. Young people between 15–24 years old tend to be unmarried and still in school or college (Table A1, in the Appendix). It is this effect of interaction between being young, at school and unmarried that provides more degrees of freedom and higher aspiration levels which, in turn, lead to a more critical attitude about the country of current residence, to relative unhappiness about living in the country where they were born, whether or not they had lived abroad. On the other hand, the fact of being unmarried and, to a large extent, reliant on the maintenance of their parents, favours the tendency to be satisfied with life, public services and the country in which they live.

Those who use the Internet more tend to be mostly young or mature, with an SWB profile similar to that of single young people (Table A2). They differ only in that they are inclined to be satisfied with the level of income in the household.

Another composite factor that matters in the equation is also belonging to a higher social class. These, as the data with which I have worked say, are tendential, of course – those who do not have difficulty paying their monthly bills, have a high level of education and recognise themselves as members of an upper social

class. The interaction between all these variables leads to SWB, both on satisfaction and happiness indicators (Table A2). Only trust in institutions – government, parliament, central administration and local government – has a similar positive effect on all forms of SWB analysed here.

In terms of the residential environment, SWB seems to be higher in the village than in the big cities. About public services alone, I do not have, at the European level, a significant relationship between the type of residential environment and the SWB. In terms of gender, men seem to be more satisfied than women with income, public services and their own country. Satisfaction with one's own life seems to be higher in women than in men (Table 2), in concordance. It is unclear why, in the low prediction model, with latent variables as factors, the gender of men seems to be more satisfied. Probably because the gender effect resulting from the factorial analysis (Table A1, in the Appendix) appears to be a composite one, with many other associated variables.

Higher income is reflected in the ability to pay monthly bills. Income, as reflected in the difficulties to pay bills is one of the most efficient predictors of the model (Table 2). All 5 types of SWB are significantly higher if the person did not have difficulties paying bills in the previous year. Multivariate regression allows us to identify the hierarchy of influence of income between different forms of SWB. If one changes the situation from not having to having difficulties paying bills, this reduces happiness in the country by 0.154 units (Table 2). The same type of change reduces, also significantly, the country satisfaction by 0.061 units (Table 2). These are the two regression coefficients. Using a post-command in STATA, after running multivariate regression, allows us to conclude that the impact of income is higher on country happiness than on country satisfaction. Why is it so? I do not have the necessary data to answer the question but I have the empirical reasons to support the hypothesis that income difficulties have a higher impact on country happiness than on country satisfaction.

Conclusions and discussion

This analysis primarily attempts to substantiate the idea that the experience of migration abroad matters to subjective well-being (SWB) differentiated, depending on its content, within the *living area* of the EU. Specifically, I expect those who have returned to their home countries, with a richer experience of work and study, to be happier with their own country of residence and more satisfied with their own lives. In other words, to have higher subjective well-being than non-migrants from the country of origin to which they returned. Secondly, apart from migration abroad and ordinary socio-demographic factors, I expect the country of current residence effect to also matter. I use the Eurobarometer survey data to support both hypotheses of the research but also bring surprises in terms of knowledge.

The focus of the analysis is, according to the starting assumptions, on the specific or net effects that the experience of migration abroad and the country of current residence have on the SWB. How returning migrants from the EU relate to their well-being is strongly differentiated not only according to their experience of migration abroad but also to the subjective wealth facet being taken into account. Having worked and studied abroad (within the EU area to which the survey refers) brings, *caeteris paribus*, more satisfaction with personal life, household income and public services in the country where they live if I compare them with non-migrants. The same cumulative migration experience does not lead to a significant, positive effect on happiness in the country of habitation (Table A2, in the Appendix).

If the survey respondent worked abroad but did not study there, then the effects are contradictory: s/he tends to be satisfied with the country in which s/he lives but is relatively unfortunate that s/he lives in the reference country. Subjective well-being related to public services, one's own life or the perception of household income does not seem to be significantly influenced by his/her experience of migrating abroad.

Why this differentiation of the effects of migration experiences on SWB? It turns out that different facets of perceived well-being are impacted on by different facets of migration. The assessment of the state of

happiness–unhappiness is made through multiple, comparative, short-term reports between the former country of emigration and the one of return. In contrast, satisfaction assessments are less comparative and lengthy, mostly centred on the country where one lives. Hence the tendency to show, especially, unhappiness about the home country of residence if compared to the previous destination of migration. In contrast, in non-comparative assessments, related to the country of current residence and the public services in that country, the effect of migration is mainly that of contentment. In addition, it could also be that happiness-centred assessments are short-term and those relating to satisfaction aim at an extended time horizon (Helliwell and Putnam 2004).

Regardless, however, of the effects of migration and those of the socio-demographic characteristics of the respondents – controlled by multivariate regression analysis – the country of current residence also matters consistently. On this feature, the H2 hypothesis is fully confirmed. In developed countries, immigration, like countries of residence, tends to induce increased levels of subjective well-being. Austria and the Netherlands are representatives of this point of view. They are joined by Germany, the Scandinavian countries, Great Britain and Ireland. It is not clear whether the exceptional case is of living in Belgium, with negative effects on SWB.

The predominantly negative reporting to SWB is recorded in the Southern and Central and Eastern European countries.

Regression analyses have failed to identify country-specific effects for each of the 5 subjective welfare variables, controlling migration experiences and socio-demographic aspects. Based on these data, I have identified 7 groups of countries in terms of the similarity of the causal effects that housing within them has on SWB.

The stability of the multivariate analysis results was verified using a factorial analysis of the 14 socio-demographic variables. The 7 resulting factorial scores replaced the initial values of socio-demographic variables in alternative regression models. Starting from the regressions with fewer predictors, I have also generated new clusters of countries in terms of their SWB prediction profiles. The differences that occur in the results are secondary and confirm the reduced sensitivity of the analysis models (Treiman 2014) to the methodological changes made.

The fact that I did not have a direct measurement of personal happiness at the level of the available survey data is an example of a limit, a critical point, in the analysis presented. A more detailed measurement of SWB can, of course, influence the results of the analysis.

Unfortunately, the EB89 does not provide information on the former destination country of returnees, so I could not measure the distance in terms of GDP *per capita* between the former destination and the current residence country.

Eurobarometer data, used here, were collected before the Covid-19 pandemic. A replication of the analysis, after the pandemic, would undoubtedly be extremely useful.

Acknowledgements

Thanks for the comments and suggestions of reviewers and journal editors on the manuscript. These helped me to improve the analysis. Naturally, I am responsible for the final form of the text.

Conflict of interest statement

No conflict of interest was reported by the author.

ORCID ID

Dumitru Sandu https://orcid.org/0000-0001-8618-2252

References

Baykara-Krumme H., Platt L. (2018). Life Satisfaction of Migrants, Stayers and Returnees: Reaping the Fruits of Migration in Old Age? *Ageing & Society* 38(4): 721–745.

Bilecen T. (2022). To Stay or to Return? A Review on Return Migration Literature. *Migration Letters* 19(4): 367–385.

Croitoru A. (2020). Great Expectations: A Regional Study of Entrepreneurship among Romanian Return Migrants. *Sage Open* 10(2): 2158244020921149.

De Haas H., Fokkema T., Fihri M.F. (2015). Return Migration as Failure or Success? *Journal of International Migration and Integration* 16(2): 415–429.

Diener E., Oishi S., Tay L. (2018). Advances in Subjective Well-Being Research. *Nature Human Behaviour* 2(4): 253–260.

Galván Reyes J., Casanova Rodas L., Saavedra Solano N., Alanís Navarro S., Berenzon Gorn S. (2023). Subjective Well-Being in Mexican Return Migrants. *Journal of International Migration and Integration* 24: 1067–1089.

Grabowska I., Jastrzebowska A. (2023). Migration Informal Human Capital of Returnees to Central Europe: A New Resource for Organisations. *Central European Management Journal* 31(1): 14–29.

Gruber S., Sand G. (2022). Does Migration Pay Off in Later Life? Income and Subjective Well-Being of Older Migrants in Europe. *Social Indicators Research* 160(2–3): 969–988.

Hagan J.M., Wassink J.T. (2020). Return Migration Around the World: An Integrated Agenda for Future Research. *Annual Review of Sociology* 46(1): 533–552.

Helliwell J.F., Putnam R.D. (2004). The Social Context of Well-Being. *Philosophical Transactions of the Royal Society of London. Series B: Biological Sciences* 359(1449): 1435–1446.

Hendriks M., Bartram D. (2019). Bringing Happiness into the Study of Migration and Its Consequences: What, Why, and How? *Journal of Immigrant & Refugee Studies* 17(3): 279–298.

Janta H., Jephcote C., Williams A.M., Li G. (2021). Returned Migrants' Acquisition of Competencies: The Contingencies of Space and Time. *Journal of Ethnic and Migration Studies* 47(8): 1740–1757.

King R. (2018). Theorising New European Youth Mobilities. *Population, Space and Place* 24(1): e2117.

King R., Kuschminder K. (eds) (2022). *Handbook of Return Migration*. Cheltenham: Edward Elgar.

King R., Moroşanu L., Jakobson M.L., Schmidt G., Miah M.F., Vetik R., Money J. (2022). Editorial Introduction: Relocating East–West Migration and (Im)Mobilities. *Central and Eastern European Migration Review* 11(2): 5–15.

Massey D.S., Arango J., Hugo G., Kouaouci A., Pellegrino A. (1999). *Worlds in Motion: Understanding International Migration at the End of the Millennium*. Oxford: Clarendon Press.

Ruggeri K., Garcia-Garzon E., Maguire Á., Matz S., Huppert F.A. (2020). Well-Being Is More than Happiness and Life Satisfaction: A Multidimensional Analysis of 21 Countries. *Health and Quality of Life Outcomes* 18(1): 1–16.

Sandu D., Toth G., Tudor E. (2018). The Nexus of Motivation–Experience in the Migration Process of Young Romanians. *Population, Space and Place* 24(1): e2114.

Treiman D.J. (2014). *Quantitative Data Analysis: Doing Social Research to Test Ideas*. Chichester: John Wiley & Sons.

UCLA (nd). Multivariate Regression Analysis. Stata Data Analysis Examples. Statistical Methods and Data Analytics. https://stats.oarc.ucla.edu/stata/dae/multivariate-regression-analysis/ (accessed 19 February 2024).

Voicu B., Vasile M. (2014). Do 'Cultures of Life Satisfaction' Travel? *Current Sociology* 62(1): 81–99.

White, A. (2022). Return Migration Experiences: The Case of Central and Eastern Europe, in: R. King, K. Kuschminder (eds), *Handbook of Return Migration*, pp. 299–312. Cheltenham: Edward Elgar Publishing.

Appendix

Table A1. The structuring of the status variables by factors

Input variables	Social-status factors					
	Students 1	**Net users 2**	**High institutional trust 3**	**City dwellers 4**	**Higher class 5**	**Man 6**
Age 15–34*	.829	.200	–.015	.027	.072	.061
Still studying*	.747	.069	.040	.008	.028	.071
Married*	–.593	.017	–.009	–.094	.128	.185
Age 65+ years*	–.214	–.845	.046	.012	.075	–.042
High frequency of net use*	.184	.751	.073	.046	.265	.087
Age 35–49*	–.508	.612	–.021	.004	–.111	–.090
Trust in central & local administration – factor score	.041	.038	.915	–.003	.104	–.004
Trust in parliament & government – factor score	–.001	–.016	.912	.022	.104	.001
Residence in city*	.058	.010	–.001	.828	.037	.050
Residence in village*	–.045	–.025	–.015	–.828	–.020	.037
Subjective social class (1=working class; 5=higher class)	.103	.046	–.018	.052	.753	–.109
Difficulty paying bills in last year (1=never; 5=most of the time)	.013	.109	–.237	.080	–.657	–.195
Graduated from higher education*	–.241	.322	.095	.150	.508	–.083
Man*	–.019	.057	–.005	.020	–0.17	.952
Eigenvalues (% explained by the factors) after rotation	16.097	13.922	12.439	9.784	7.706	7.235

Data source: Eurobarometer 89.1, March 2018 (EB89).

Notes: Extraction Method Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalisation. * Dummy variable. N=23,614. Figures in the table, except the last row of Eigenvalues, are factor loadings. KMO=0.574.

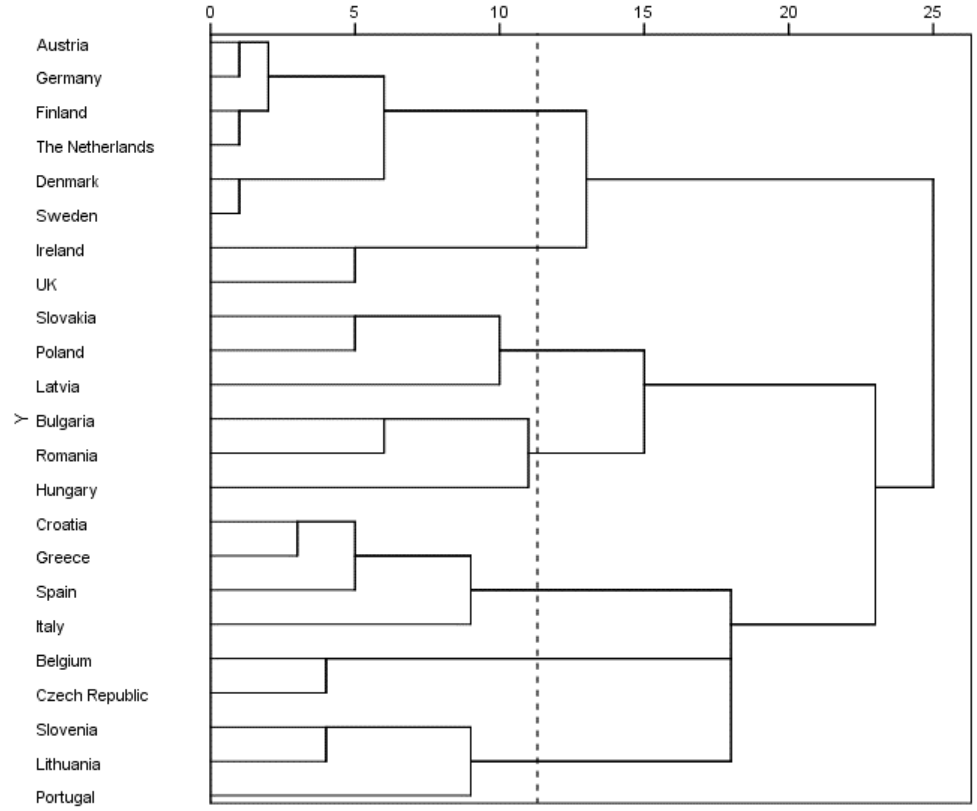
Table A2. Predictors of happiness and satisfaction in European Union countries: reduced model

Predictors		Happy living in the countr of current residence		Degree of satisfaction 1 minimum … 4 maximum) with…							
				… the country of current residence		… public services		… own life		… household income	
		b	p	b	p	b	p	b	p	b	p
Returnee's experience abroad (ref. non-migrant)	Accompany*	**–0.122**	**0.000**	0.097	0.000	0.008	0.766	–0.049	0.059	0.022	0.381
	Study*	–0.031	0.143	0.175	0.000	0.090	0.000	0.015	0.466	0.011	0.568
	Work*	**–0.060**	**0.000**	0.076	0.000	0.001	0.955	–0.001	0.949	–0.010	0.509
	Work+study*	0.022	0.068	0.137	0.000	0.121	0.000	0.045	0.000	0.074	0.000
Students		**–0.027**	**0.000**	0.022	0.000	0.053	0.000	0.033	0.000	0.006	0.103
Netusers		**–0.042**	**0.000**	0.028	0.000	0.028	0.000	0.047	0.000	0.032	0.000
Institutional trust		0.176	0.000	0.348	0.000	0.352	0.000	0.195	0.000	0.210	0.000
City dwellers		**–0.028**	**0.000**	–0.006	0.126	0.008	0.060	**–0.024**	**0.000**	**–0.023**	**0.000**
High class		0.078	0.000	0.089	0.000	0.060	0.000	0.184	0.000	0.254	0.000
Man		0.006	0.181	0.035	0.000	0.019	0.000	0.021	0.000	0.056	0.000
Constant		3.454	0.000	2.291	0.000	2.476	0.000	3.042	0.000	2.747	0.000
R2		0.181		0.550		0.338		0.288		0.312	
N		23,577		23,577		23,577		23,577		23,577	

Data source: Eurobarometer 89.1, March 2018 (EB89).

Notes: Results of multivariate multiple regression: b regression coefficient, p significance level. The socio-demographic variables from Table 2 are replaced by factor scores that are generated by the factor analysis from Table A1. Small countries like Cyprus, Malta, Estonia and Slovenia are not included. France is also omitted as a reference country to avoid multicollinearity in tests of the multivariate regression. Coefficients for the 23 countries of residence are not presented here. Country happiness is tested by a question on the agreement with the statement 'You are happy living in … (reference country)'. The answers for all the dependent variables are recorded by direct scaling: 1=fully disagree … 4=fully agree, with the positive statement for all 5 SWB components. * Dummy variable. Shadow marks the positive regression coefficients that are significant for p<=0.001. Negative regression coefficients for p<=0.001 are in bold figures. Shadow and bold are used to make evident the probable relations of maximum intensity.

Figure A1. Similarities between countries by their specific impact on the 5 items of subjective well-being, starting from reduced model regressions



Data source: Eurobarometer 89.1, March 2018 (EB89).

Notes: Results of hierarchical cluster analysis, furthest neighbour, correlation coefficients as measures of similarity, standardisation of clustering variables by z scores. Input data come from the 5-regression equation, reduced model, presented in Table A2. The causal profile for each of the 23 considered countries is given by the regression coefficients predicting the values of the 5 SWB indicators in the multivariate regression, with the 10 predictors that are specified in Table A2, plus the 23 residence countries from the EU (reference term – four small countries and France) and also the significance probabilities for each of the dependent variables for the SWB indicators. Example: the highest similarity of causal profiles in influencing SWB at the country level is for samples from the Southern European countries of Croatia, Spain, Italy and Greece. The most heterogeneous cluster includes Romania, Portugal, Slovakia and Bulgaria. The last 2 statements are based on the mean values of Silhouette coefficients that were computed for each country. The mean value for the Silhouette coefficients is 0.559, a bit higher than for the classification using as input data the full models of regression (Figure 1).

How to cite this article: Sandu D. (2024). Subjective Well-Being between the Migration Experience of Returnees and the Country Effect: An Integrated Approach on European Spaces. *Central and Eastern European Migration Review* 13(1): 151–168.

Central and Eastern European Migration Review
Received: 9 August 2022, Accepted: 15 March 2024
Published online: 14 June 2024
Vol. 13, No. 1, 2024, pp. 169–188
doi: 10.54667/ceemr.2024.09

From Roots to Routes: The Role of Ethnic Networks in the Development of Migrant Communities in Russia

Mihran Galstyan*, Nare Galstyan**, Gayane Hakobyan*

This article examines the role of ethnic networks in the development of migrant communities by focusing on modern-day Armenian migration to Russia. While much existing research on migrant networks tends to focus on newly arrived migrants' experiences of gaining support in the destination countries through ethnic networks, little has been said about the impact of ethnic networks on migrant community development. Additionally, studies on the Armenian communities' development are mainly focused on the historical context and scholars see little interest in studying modern-day Armenian migration and migrant community development. Drawing on empirical data from Armenia, this study explores how post-Soviet migration to Russia shapes contemporary Armenian communities there. Through a combination of quantitative and qualitative research conducted in 2020−2021, the article studies the significance of ethnic networks at both individual and collective levels. The quantitative research results offer insights into the role of ethnic networks in shaping migratory routes, while qualitative research highlights how these networks contribute to community construction, driven by regional affiliations that differ from traditional Armenian diaspora institutions. The study reveals the multiple roles of ethnic networks, including their influence on migratory behaviour, their persistence and importance across generations and their impact on community organisations' development and leadership. It also highlights migrants' preferences for engaging with their regions or villages of origin.

Keywords: ethnic networks, migrant community, post-Soviet migration

* National Academy of the Republic of Armenia, Armenia.
** Syracuse University, US. Address for correspondence: ngalstya@syr.edu.

Introduction

Russia has the largest population of ethnic Armenians outside Armenia (approximately 2 million) and, given Armenia's tiny population of approximately 3 million people, the importance of Russia as a receiving country for Armenian migrants and diaspora is significant. The need to study post-Soviet Armenian communities has been underlined by several scholars. For example, Torosyan and Vardanyan (2020) and Cavoukian (2013) differentiate between two major segments of the Armenian diaspora: the 'victim' diaspora − formed mainly after the Genocide − and recent migration flows from Armenia following the collapse of the Soviet Union. When referring to migrants from Armenia, Tölölyan and Papazian (2014) underline that many important links and the heterogeneity of the Armenian diaspora remain understudied. This lack of research is not unexpected, considering that the establishment of Armenian diasporic communities mainly arose from the compelled displacement of Armenians from their ancestral homeland in the Ottoman Empire during the 1915 Genocide (Panossian 2003). Armenian communities, like Jewish and Greek diasporas, have often been categorised as 'traditional', 'classical' or 'historical' diasporas (Armstrong 1976; Safran 1991; Smith 1986). The existing scholarship on Armenian migration has predominantly focused on classical diaspora attributes, such as forced displacement, a strong sense of victimhood, a deep nostalgic connection to the homeland and a distinct organisational basis (Shain 1994; Vertovec 1997). However, there has been limited exploration of post-Soviet migration waves from Armenia and the emergence of new Armenian diasporic communities that do not fit into the conventional 'victim' or 'classical' diaspora framework. The Armenian−Azerbaijani conflict over Nagorno-Karabakh, coupled with economic crises, high unemployment rates, low wages and political instability, has played a significant role in influencing Armenian emigration since the fall of the Soviet Union. These factors have given rise to a new wave of Armenian migration, leading to the development of new communities that exhibit characteristics distinct from those of the classical or traditional diaspora.

In the meantime, contemporary literature focusing on diverse global communities such as the Chinese, Mexican, Turkish, Moroccan or Ukrainian diasporas considers not only social, economic or push and pull factors but also the migrant networks that enabled the migration waves (Cheung 2004; Collins 2002; Hoffman, Makovsky and Werz 2020; Kesici 2021). Nevertheless, while many authors have extensively studied the role of ethnic networks at the individual migrant level, the exploration of ethnic networks in community construction has been largely overlooked. Moreover, ethnic networks' functionalities have been mainly studied as a migratory phenomenon typical for the first generation of migrants and the experiences of second- or third-generation migrants in maintaining these ties have remained understudied (Bruneau 2010).

To address the specific gap in the literature concerning the role of ethnic networks in the process of community construction, the article reflects on the recent migration from Armenia and the formation of new Armenian communities in different parts of the Russian Federation during the post-Soviet period. We examine the role of ethnic networks in creating communities with the aim of enriching the literature on both modern Armenian migration and recently developed migrant communities. This study highlights that migrants from specific places or regions of origin form communities − and continuously replenish and sustain them over generations − based on their ethnic networks. Additionally, these Armenian communities establish their organisations based mainly on their pre-migratory regional origins, which differ from the traditional diaspora institutions of the Armenian diaspora. Traditional diaspora institutions typically have a transnational character, connecting Armenian diasporic institutions worldwide through hierarchically organised institutional networks. In contrast, the newly formed organisations in Russia centre their activities within the city where their members have settled, primarily focusing on their kinship networks. Their transnational activities, however, are mainly directed toward the regions, villages or cities from which they originated. They form organisations that prefer to maintain ties with the regions or settlements from where they originate.

The article starts with a theoretical discussion that focuses on the clarification of the key terms used in this study as well as the significance of ethnic networks in the migration literature. It is followed by a brief historical overview of Armenian migration to Russia. The subsequent section outlines the methodological approach of the article, which combines both quantitative and qualitative methods. The main body of the article follows a two-tier structure: the first section presents the findings of a survey conducted in 2020−2021, examining the role of ethnic networks in shaping individual migratory routes. In the subsequent section, a qualitative analysis of the role of ethnic networks in the process of community construction is presented. Finally, the conclusion summarises the key findings of the study and establishes connections with relevant issues in contemporary migration studies.

Theoretical discussions

Before delving into the discussion, it is essential to provide clear definitions for the terms 'diaspora', 'ethnicity' and 'community'. We adopt Brubaker's (2006) perspective, which emphasises that race and ethnicity are social constructs for categorising the self and others. Thus, when using the term 'ethnicity', we refer to the ethnic belonging of migrants which, in a non-ethnic environment, provides the internal cohesion of community members, delineating boundaries between 'us' and 'others'.

In line with Brubaker's viewpoint (2005), we look at diaspora as a category of practice and at the formation of a diasporic community as an outcome of mobilisation processes that are developed in various ways by political leaders and intellectuals. The development of post-Soviet Armenian communities and community organisations in Russia is unique and largely differs from Western diasporas. This is because Armenians in Russia found it difficult to consider themselves as diasporans, as they all used to be citizens of the USSR (Libardian 1999). In this regard, Lourie (1999) noted that Armenians living in various cities of the former Soviet Union usually did not use the words 'diaspora', as the territory was not perceived as foreign. The word community (*obshchina*) has been used in the Russian-language academic literature when referring to Armenian migration to Russia (see, for example, Agadzhanyan 2016; Bzarov 2019; Zakhar'yan 2013). Continuing in this vein, we adopt the term 'community' or 'migrant community' without juxtaposing it against the term 'diaspora' but, rather, underscoring its distinctiveness as not solely comprising the descendants of a 'victim diaspora' but as an outcome of recent migration waves since the 1990s.

With 'community' or 'migrant community' we are referring to individuals and groups who identify as Armenians, who are involved in activities promoted by Armenian associations or institutions and who take (some) part in either formal or informal community mobilisation projects (Galstyan and Ambrosini 2023). When migrants become active members of a migrant organisation, it can be assumed that they wish to retain ties with their home countries and co-ethnics, as opposed to entirely immersing themselves in new host societies. We consider diaspora engagement as another important indicator of community development. Werbner (2002) finds that cultural, political and philanthropic sentimental performances are key defining aspects of diasporic communities. In other words, diasporic communities exist in their ability to mobilise fellow diaspora members to a common cause. Diaspora engagement is a 'purposive action' (Brinkerhoff 2008) driven by ties of co-responsibility, which differentiate a diaspora from an ethnic community. Van Hear and Cohen (2017) proposed to distinguish three spheres of diaspora engagement: a) household and extended family − this is a largely personal and private sphere of engagement; b) known community sphere − this takes place in spaces where one has lived, where van Hear distinguishes hometown associations, home village associations and school associations as the main forms of organisation that are engaged in collective remittances and the transfer of financial resources to the communities left behind; and c) imagined community − the term here is borrowed from Anderson (2020), who refers to the nation with which one has an affinity without necessarily

knowing the members. The article also highlights how migrant networks turn into communities through the mobilisation process.

As we delve into the dynamics of community formation, it becomes vital to examine the scholarly discourse on migrant networks within the migration literature. Understanding how these networks have been discussed and the extent to which they contribute to the establishment and endurance of migrant communities is of paramount importance.

Building upon the exploration of community dynamics, it is important to examine the scholarly discourse on migrant networks in the migration literature − more specifically, understanding how these networks have been discussed and their contribution to the establishment and endurance of migrant or diasporic communities. Douglas S. Massey has provided a well-known definition of migrant networks: 'sets of interpersonal ties that connect migrants, former migrants and non-migrants in origin and destination areas through ties of kinship, friendship and shared community origin' (Massey 1999: 42). The idea that migrant networks function as a capital for gaining social support and social leverage is not new. Researchers agree that migrant networks connect migrants at a destination to individuals at origin and enable continuous migration (Chuatico and Haan 2022; de Haas 2009; Köngeter and Smith 2015; Ryan, Sales, Tilki and Siara 2008). Portes (1998) described the provision of resources to members of the same ethnic, religious and territorial group to facilitate the migration process as 'tied solidarity'. Migrant networks, including ethnic networks, play a guiding, contributing and supportive role. Networked migration usually starts with a family member and later expands to a group of people from the same location who migrate to the new destination country with the help of their migrant relatives and fellow community members (de Haas 2010; Fawcett 1989). A settlement of pioneers is the first step in establishing a community in the new location, as they stimulate further migration expansion among family members, relatives and friends in the country of origin (Bakewell, de Haas and Kubal 2012; Massey, Arango, Hugo, Kouaouci, Pellegrino and Taylor 1994; Vertovec 2002). Network connections also constitute a valuable form of social capital facilitating access to the labour market (Dagnelie, Mayda and Maystadt 2019; Damm 2009; Gericke, Burmeister, Löwe, Deller and Pundt 2018; Massey 1987). In more recent studies, the role of ethnic and social networks has been studied within the context of irregular migration (Castles, Arias Cubas, Kim and Ozkul 2012; Dennison 2022; Kuschminder, De Bresser and Siegel 2015; van Uden and Jongerden 2021) and migrant smuggling (Triandafyllidou 2015). Ambrosini (2017: 7) argues that 'having a reliable contact in the receiving society pays more than a high-school diploma in irregular migrants' ventures', while the lack of support networks or the inability to build them may result in social isolation and social weakness (Ambrosini 2018). Scholars do not necessarily insist that networks are exclusively positive, supportive and empowering, as they also highlight the negative aspects of networks (e.g. Portes 1998). The negative aspects are that they may be limiting migrants' opportunities, for example by channeling migrants into low-paid, dead-end jobs. Networks can also function as closed, restricted or elitist groups that operate in ways that limit access to valuable resources (Ryan, Eve and Keskiner 2022).

While many recently developed communities have ethnic networks as a basis for community development, the role of migrant networks has been mostly discussed at an individual level. The role of ethnic networks in the diaspora development process has remained largely unnoticed (de Haas 2007, 2009). A well-known example is Turkish migration to Western Europe and the USA (Kilic and Biffl 2021) after the end of the guestworker programmes in the 1960s, as well as political upheavals in Turkey in 1971 and 1980. Similarly, research on Mexico–US migration has illustrated that having kinship and sending community ties have been key drivers for migration to the US (Davis and Winters 2001; Kanaiaupuni 2000; Massey 1987). Modern diasporas have evolved, as the migration movement accelerated in the 1950s by European acceptance of labour migrants and, after 1965, by the Hart-Celler Act that facilitated non-European-origin migration and entry to the US (Gerber 2021; Wolgin 2011). Several studies focusing on the Armenian diaspora in Eastern Europe

have underlined the presence of migratory networks and chain migration as important factors for migratory behaviour (Siekierski and Troebst 2016). The development of several communities was based on chain migration − migrants assisting family members, friends and neighbours in migrating and joining them in their new host countries. These migration waves have become the basis for the development of new communities − or new communities that join pre-existing ones (Galstyan, Hakobyan, Mnatsakanyan and Galstyan 2022). Nevertheless, many aspects of the role of ethnic networks in the context of community developments have remained unnoticed, such as intra-community structure, engagement priorities, organisational basis and management. For example, hometown associations (HTAs) that are closely related to ethnic networks have been approached within the nexus of migration and development: 'transnational' institutions that link migrants to family and townspeople who stayed behind and link the flow of remittances sent by migrants to their home communities (Fitzgerald 2008). By focusing on ethnic networks, we unpack the heterogeneity of migrants' communities, in consideration that one of the main characteristics of the modern conceptualisation of them is the recognition of their heterogeneity and dynamic character that 'is defined not by essence or purity but by the recognition of a necessary heterogeneity and diversity' (Hall 1994: 402). Our work builds on this literature by addressing how social networks influence migration destinations at an individual level and community development at the collective level, both of which are relatively understudied issues.

Methodology

The research materials were gathered using a comprehensive approach that combined both quantitative and qualitative studies that took place in 2020−2021. This was achieved through document analysis, expert interviews, in-depth interviews and a survey. The survey and in-depth interview study involved households in Armenia that had family members who had migrated to Russia. This mixed-methods approach allowed for a comprehensive understanding of the role of ethnic networks in shaping migratory routes and community construction among the Armenian diasporas. Based on our probability sample (n = 639; 99 per cent confidence interval and 5 per cent margin of error) the sample size for the survey was calculated by considering the number of households in the Republic of Armenia as the sample frame. Of the 639 households, 390 participated in the survey (61 per cent), as only their family members emigrated to Russia.[1]

The response rate stands at 38.7 per cent. Some 40.2 per cent declined and, in 21.1 per cent of cases, the individual with any knowledge of emigration history was unavailable during the fieldwork. The multi-stage approach to identifying and selecting spatial clusters was applied. In the first stage, the stratification was done according to the capital city and other regions of Armenia, then according to Yerevan communities, regional cities and rural communities with probabilities proportional to their population size. In the second stage, households were randomly selected in each community. In each settlement, we calculated the number of routes (streets) for the sampling. Six households per route were selected and the starting points in the routes were selected systematically from the address directory based on the probability method. For our research, the survey was conducted in those households where there were migrant household members. In the third stage, in each selected household one adult household member, male or female, aged 18 or above, who claimed to be well-informed about the emigration history of their household members, was selected. The survey results indicated that 1 259 of the surveyed household members were migrants, of whom 61 per cent migrated to Russia.[2] We explored the migration paths and reasons of the ethnic networks involved in the migratory experience, as well as their role in facilitating migration and settlement. In the article, we highlighted the problem of community formation and migrants' families' perception of the role of migrants' networks – therefore, our aims were of a descriptive nature.

Twenty interviewers, who had been trained about the objectives of our research, the sample composition and the questionnaire completion guidelines, conducted face-to-face interviews. These were administered using traditional pen-and-paper techniques.

In this study, we also used qualitative study materials: we conducted individual in-depth interviews with 123 households within 10 regions of Armenia that have migrant family members, of which 58 interviews were with households that had migrants living in Russia (13 interviews with people from 4 villages included in this research) between 2018 and 2021. We conducted in-depth interviews using the snowball method and the participants differed from those who took part in the quantitative survey. To avoid repetition, we included an additional question to ascertain whether the respondents had participated in a quantitative survey on the same topic. The participants were mainly interviewed in their homes and the interviews lasted around one hour and were conducted in Armenian and translated into English by the researchers. Qualitative research was chosen to give room for personal migratory stories, which enabled participants to give nuanced answers about their family members' migratory experiences and allowed the researchers to identify the issues and themes that are important in the research context. The purpose of the qualitative research conducted was to explore and understand people's ideas, approaches and experiences.

We conducted a thematic analysis of archival and academic materials related to the Soviet and post-Soviet periods of Armenian migration. Another important qualitative source was expert interviews conducted with 29 specialists such as members of the Parliament of the Republic of Armenia, experts working at the Migration Service of the Russian Federation, the Office of the Commissioner for Diaspora Affairs, heads of municipalities and academics (including demographers, statisticians, economists and diaspora experts).

Both in-depth interviews with migrants' family members and expert interviews were audio-recorded and transcribed in full. The research process consisted of two main steps. Firstly, all interviews were transcribed and subsequently cleaned, sorted and formatted for analysis. In the second step, all transcripts and materials were reviewed repeatedly until the scope of the analysis was determined. The analytical approach employed for this research was an inductive one, moving from specific instances to broader generalisations. Through this method, semantic units or key concepts were identified and then organised into themes to derive meaning from the data. We used reflexivity as an active research stance to avoid stereotypical and clichéd portrayals of the researched groups and to maintain awareness of data collection as an active process in which the positions of both the researcher and the interviewee are socially constructed and embedded (Zapata-Barrero and Yalaz 2018).

One of the core ethical issues of social research is the principle of anonymity and confidentiality. Before conducting the interviews, we obtained informed consent from the participants to utilise the information they shared for research purposes, ensuring that their identities and personal details remained confidential and protected. Furthermore, after transcribing the interviews, the recordings were deleted to further protect the participants' identities. In addition to safeguarding anonymity, the research team strictly controlled access to the interview recordings. This measure ensured that only authorised individuals involved in the transcription process had access to the data, thereby reducing the risk of unauthorised disclosure.

Although respondents willingly cooperated and shared information, we had to be mindful of the concept of 'deductive disclosure' (Sieber 1994; Tolich 2004). This occurs when research participants can be recognised or identified in the research report. The risk of deductive disclosure is particularly pronounced when presenting detailed qualitative research about small communities and villages. While the research participants themselves may not be identifiable to the general public, individuals familiar with the community might still be able to recognise specific participants based on characteristics such as age group and migration stories. Therefore, the confidentiality of the participants was maintained by changing the names of participants when quoting them. Additionally, we de-identified villages and communities by using generic names such as Village 1, Village 2

etc. These measures were taken to ensure the confidentiality of the research participants and to uphold ethical standards throughout the study.

The historical context of the Armenian presence in Russia

The Armenian community in Russia comprises diverse migration flows, which can be tentatively categorised into three groups: pre-Soviet migration, migration during the Soviet Union and post-Soviet migration (emerging after Armenia gained independence). Armenians have a longstanding migration history in Russia, with one of the earliest migration waves dating back to the 11th and 12th centuries during the time of Kievan Russia (Miqaelyan 2003).

The largest influx of Armenians into Russia in the pre-Soviet period occurred following the 1915 Genocide committed by the Ottoman Empire, as some of the Armenian survivors sought refuge in Russia's southern administrative centres and major cities. This group of forced migrants not only revitalised the pre-existing Armenian communities in Russia but also gave rise to new ones, thereby significantly increasing the Armenian population (Miqaelyan 2003). Until the 1920s, the life of Armenian communities in Russia was influenced by several Armenian organisations, whose activities and existence were later deemed unacceptable by the Soviet authorities and subsequently banned. These organisations were seen as tools for promoting social inequality and bourgeois ideology and of exerting influence (Aleqsanyan 2014).

The number of Armenians in Russia continued to increase after the formation of the Soviet Union in 1922. Under the common socio-economic and cultural policy implemented by the Soviet state, there was a notable influx of Armenians from Armenia and other Soviet republics to Russia. This trend is supported by statistical data on the national composition of Russia (Demoscope 1992, 2000, 2010), as shown in Table 1.

Table 1. Armenians in Russia*

Year	Number of people
1939	218,136
1959	255,978
1970	298,718
1979	364,570
1989	532,390
2002	1,130,491
2010	1,182,388
2021	946,172

Note: *Population census 1939, 1959, 1970, 1979, 1989, 2002, 2010, 2020.

The statistics indicate that the number of Armenians in the Russian Federation almost doubled between 1959 and 1989. During the Soviet era, Armenians migrated to the Russian Federation for various reasons, including, *inter alia*, education, military service and state-sponsored labour opportunities etc. Notably, several Soviet republics, including Russia, were the primary destinations for Armenian seasonal migrants, many of whom eventually decided to settle there permanently.

Another significant migration wave occurred in 1988, following a catastrophic earthquake in Armenia which led to the evacuation of approximately 200,000 people from the affected zone to other former Soviet republics, including Russia (Yeganyan 2020). Although many of the evacuated individuals eventually returned

to Armenia after the region was rebuilt, around 50,000 people chose to remain in Russia and, over time, were joined by their family members and relatives. Additionally, between 1988 and 1992, the Armenian−Azerbaijani war over Nagorno-Karabakh resulted in the deportation of about 420,000 refugees from Azerbaijan to Armenia (Yeganyan 2020). Due to the challenging socio-economic conditions and integration issues in Armenia, many of these refugees chose to emigrate from Armenia and primarily settled in Russia. These various migration waves have significantly contributed to the growth of the Armenian community in the Russian Federation.

Under the Soviet totalitarian system, the creation of ethnic or religious communities and their institutions was strictly prohibited. In official and academic publications concerning Armenians residing in Soviet republics other than Armenia, the term 'diaspora' was never used. This approach was ideologically driven, as Armenians, including those living in Soviet Armenia, were considered full citizens of the Soviet Union and an integral part of the entire country (Khachatryan, Ananyan, Sargsyan and Khudaverdyan 2003). During the Soviet era, the previously established Armenian community organisations in Russia experienced a gradual decline. Many Armenian schools and cultural centres were closed, Armenian periodicals ceased publication and the activities of the Armenian Church were banned.

After the collapse of the Soviet Union and the subsequent independence of Armenia, there was a significant increase in the number of emigrants due to the socio-economic crisis in the country. Between 1992 and 1994, it is estimated that around 637,500 people, approximately 18 per cent of Armenia's population, emigrated from the country. However, in the following years, from 1995 to 2001, the rate of emigration decreased to about 250,000 people or approximately 7.0 per cent of the population (Yeganyan 2020). Between 2002 and 2007, the number of emigrants from Armenia decreased to approximately 150,000 people (Yeganyan 2020). Subsequently, based on a survey conducted by the International Organization for Migration in collaboration with the National Statistical Service of Armenia, the number of emigrants from 2008 to 2013 remained at around 35,000 people each year (Yeganyan 2020). From 2014 to 2016, migration rates increased, with approximately 44,300 people leaving the country. However, the numbers started to decrease again in 2017, with 24,000 migrants, followed by 18 286 migrants in 2018 and 15,400 in 2019.

According to Yeganyan (2020), from 1988 to 2019, the net balance of external migration in Armenia resulted in a negative figure of 1,600,000 to 1,700,000 people, with the majority of these movements (87.8 per cent) directed towards the Russian Federation (Armstat 2020). These migration patterns reflect the varying economic and social conditions in Armenia and the influence of factors such as employment opportunities and living standards in shaping migration trends over the years.

The interplay of the restrictive policy and the past shared association with the same country – the Soviet Union − as well as the ongoing influx of Armenians, had a profound impact on the Armenian community in Russia. These factors set it apart from other Armenian diasporic communities, often referred to as 'victim' diasporas with well-established transnational organisational structures (e.g., the Armenian Revolutionary Federation[3] and the Armenian General Benevolent Union[4] etc.). The unique circumstances in Russia contributed to shaping the Armenian community in a distinctive manner, resulting in noticeable differences when compared to the traditional diaspora communities found in countries such as France, the United States, Lebanon, Syria and others.

Migrant networks as drivers of post-Soviet Armenian migration

The collapse of the Soviet Union and the war with neighbouring Azerbaijan over Nagorno-Karabakh in the early 1990s put Armenia into a severe socio-economic crisis, which subsequently led to increased emigration from the country. As indicated by the participants in our survey, the main reasons for migration were

overwhelmingly related to the high level of unemployment and lack of job opportunities, cited by 81 per cent of respondents as their family members' primary motives for migration. However, it is essential to note that these factors alone are not sufficient to drive migratory processes. The implementation of the migratory decision is significantly influenced by interpersonal ties and ethnic networks. According to our survey results, 37.7 per cent of respondents mentioned the existence of kinship and friendship networks as the primary reason for their family members to choose Russia as the destination country for migration. Among them, 29.3 per cent stated that these networks were composed of family members and relatives, while 12.6 per cent mentioned non-relatives, such as friends and acquaintances, as part of their migration networks. Additionally, some respondents highlighted Russia's attractive socio-economic conditions, including job markets, language skills and more, as reasons for considering it as a migration destination (see Table 2).

Table 2. Reasons for choosing Russia as a destination country

Factors	Per cent
Presence of family members, relatives	37.7
Job opportunity/offer	27.4
Easy country entry	13.8
Presence of friends, acquaintances	12.6
Knowledge of the language	11.0
Previous working, military service experience or previous visits in Russia	8.7
Marriage	8.5
Availability of property/business	2.3
Russia's prospective opportunities	2.1
Other factors	2.7
Difficult to answer	2.1

Source: Quantitative study conducted in 2020–2021, n=639.

Note: multiple choice: respondents were allowed to choose multiple answers.

Moreover, in response to the direct question of whether the existence of ethnic networks influenced their decision to migrate to Russia, 66.2 per cent of respondents confirmed that their relatives or friends living in Russia played a significant role in their family members' decision-making process. These quantitative findings were further confirmed by qualitative interviews. A 62-year-old man, whose son migrated to Russia 10 years ago, shared his experience:

> *My son was working for a private company, then that company closed down and my son became unemployed. He was looking for a job for several months but could not find one, so he decided to leave the country and migrated to Krasnoyarsk where his sister lives. His sister's family helped him to find a job. He stayed at his sister's house for about a year. Then, when he started earning well, he took his wife and children with him to Krasnoyarsk.*

The experts also concurred that networks of relatives, friends and families play a crucial role in driving emigration from Armenia. One expert, a scholar at Yerevan State University who specialises in migration issues, shared his opinion on the matter:

The likelihood of emigrating from Armenia is influenced by the presence of contacts abroad. Individuals who have close connections, such as friends living in other countries, tend to have a stronger desire to emigrate compared to those without any such contacts. However, it is essential to acknowledge that other factors, such as the profile of the destination country and its immigration policies, also contribute to the migration decision-making process.

Regarding the reasons for selecting specific countries as migration destinations, this specialist from the Office of the Chief Commissioner for Diaspora Affairs of the Republic of Armenia emphasised the significance of Armenian communities' existence abroad.

Why are some countries chosen as a destination for emigration or why are they popular? One of the reasons for this is the presence of Armenian communities in the selected countries, the presence of the Armenian environment and the presence of connections that make it easier for emigration. It allows migrants to quickly adapt to new environments, find a job and know people to whom they can turn in case of need: this is, of course, a factor and a circumstance that plays a role.

Ethnic networks not only help to reduce the costs and risks associated with relocating migrants from Armenia but also assist in overcoming the challenges which migrants face in the destination country. Regarding the multiple-choice question 'Please indicate on which issues migrants received support', the survey results revealed that 49.2 per cent of the participants mentioned that their family members found a job in the Russian Federation with the help of their networks, 39.5 per cent found accommodation, 33.1 per cent made new acquaintances, 30.3 per cent lived with a supporting person for some time, 24.4 per cent received financial support, 24.4 per cent received support with documentation in Russia (and 6.9 per cent in Armenia) and 13.8 per cent received assistance in organising their migration process.

The pivotal role of social networks was also emphasised during the in-depth interviews. For instance, a 52-year-old woman shared how her nephew played a significant role in facilitating the emigration of her son and his family.

My son got married and was expecting his first child. He worked in the power grid but became unemployed due to layoffs. After that, he was constantly thinking about leaving Armenia and finding work abroad. I was very worried because he had never left Armenia before and had never even boarded a plane − and on top of that, his wife was pregnant. I discussed the situation with my nephew, who also lived in Russia. He assured me that all we needed to do was get a plane ticket for my son and his wife and he would help him with everything once they arrived. When I heard that, I felt relieved because my son's family would not be alone there.

The survey also explored the relationship between migrants and their supporting networks. The findings indicate that a significant majority (78.1 per cent) reported that their family members rely on relatives (including mother/father, son/daughter, son-/daughter-in-law, brother/sister and other relatives) who have already established themselves in the Russian Federation − such as parents, siblings or children, as reported by the migrants' family members. For the remaining participants, the necessary resources were provided by non-family ties, such as friends, colleagues or acquaintances.

Table 3 lists the percentage of supporting individuals who moved from Armenia to the Russian Federation between 1940 and 2020. From these data, we can conclude that migration from Armenia to Russia was predominantly facilitated by migrants who settled in Russia during the post-Soviet period. However, the survey

also indicates that there are migration ties formed during the Soviet period that continue to play a significant role in the migratory process.

Table 3. Migrants' ties with the person supporting the migrant

Supporting people	Per cent
Mother/father	11.3
Son/daughter	2.6
Son-/daughter-in-law	2.3
Brother/sister	21.1
Friends	23.0
Colleague	5.3
Other relatives (uncle, aunt, cousins)	40.8
Acquaintance/ neighbour	7.5
Other	1.5

Source: Quantitative study conducted in 2020–2021, n=639.

Note: multiple choice: respondents were allowed to choose multiple answers.

During the interviews, the intergenerational connections that influenced migration from Armenia were frequently revealed. For instance, in an interview with a 38-year-old man, the persistence of networks over generations and their impact on migration routes from Armenia was highlighted:

> *My grandfather's brother served in the Soviet army in Russia from 1978 to 1980. After completing his service, he decided to stay in Russia and pursue further studies at a military institute. Eventually, he married an Armenian girl. In 1991−1992, when the economic situation in Armenia deteriorated, he reached out to my grandfather and invited him to join him in one of the villages in the Leningrad region. There, my grandfather found work in construction. After labouring for 5 years, he made the decision to bring his family over. First, my parents left and then 2 or 3 years later, my other brother and his family also emigrated. I chose not to go because I was able to start a small business with the money sent from there.*

Based on the research results, we can confirm that ethnic networks play a crucial role in meeting the needs of Armenian migrants and facilitating their settlement in the new environment. These networks enable migrants to receive essential information, materials and non-material support, all through the formal and informal connections established by relatives, friends and acquaintances who had already migrated to the destination country before the newcomers' arrival. A well-known Russian saying, 'Do not have a hundred rubles but have a hundred friends', illustrates the significance of social networks in this context. The pioneer migrants, as the creators and maintainers of these social networks, serve as a valuable resource for newcomers, influencing the shaping of migration routes and experiences.

Mapping the sub-community routes: qualitative evidence

While several authors (e.g., Ambrosini 2017; Bakewell *et al.* 2012) have studied the implications of networked migration on the development of migration routes and cost reduction, its impact on the community-building process has been relatively overlooked. Our qualitative research indicates that the establishment of new

Armenian communities in Russia is notably shaped by the ethnic networks of migrants. Essentially, when an individual migrates, it opens up opportunities for other members of the same ethnic and kinship network to engage in the migration process. The insights shared by the experts we interviewed, such as this specialist from the Office of the RA High Commissioner for Diaspora Affairs, further support the idea that ethnic networks play a crucial role in activating migration routes to specific destinations.

> *There are established communities in Russia, including rural communities, that consist of people who have migrated from specific geographical locations or regions of Armenia. In many cases, it appears as though an entire community or village from Armenia has been compactly relocated to one region of Russia. Community, friendship and kinship ties play a significant role in these cases, as the presence of a community in the destination country becomes a crucial factor that drives migration in that direction.*

Our study has identified several routes that have served as sources of migration and later contributed to community development. In this study, we focus on 4 specific community routes from Village 1 (in the Tavush province in Armenia) to Moscow, from Village 2 (in the Shirak province in Armenia) to Yakutsk, from Village 3 (in the Gegharkunik region) to Nizhniy Novgorod and from Village 4 (in the Gegharkunik region) to Omsk.

Our qualitative research reveals that Armenians from Village 1 have established a sub-community in Moscow: former villagers have set up both formal and informal family, patriotic and business organisations. These networks not only contribute to the regular operation and development of the formal and informal community structure but also compete for the expansion of economic resources, business and cultural spheres of influence with other Armenian groups (such as Armenians from Syunik, Gyumri, etc.). Frequently, these organisations lack a formal structure − unlike traditional diaspora organisations. where each member's role, rights and responsibilities are clearly defined and relationships are based on formal impersonal ties. These Armenian organisations rely mostly on informal networks and personalised connections, where the reputation of a co-ethnic person plays a crucial role in unifying the network. The ethnic networks, originating from their former village, have significant mobilisation potential, even in assisting their homeland and contributing to the development of their former village in Armenia. A 57-year-old woman from Village 1 shared the story of her brother's family, where informal networks of former villagers came together to mobilise and help their home community.

> *They migrated to Moscow in 1993 because our relatives helped them with the move. Our relatives had a construction business there and had good connections with some officials working in the Russian government. The people from Tavush who live abroad often assist each other in various matters, as many of them are friends and relatives. There are many individuals from our village and Tavush, in general, living in Moscow and they never forget about us* [the people who stayed in the village]; *they always support our native village in meaningful ways. For instance, our people in Moscow* [former residents of Village 1] *collected money and sent it to the village development fund, while people from our neighbouring villages also contributed to repairing the school and the water tank.*

According to our research, another migratory route has been established since the 1970s, with people from Village 2, in the Shirak region, primarily emigrating to the Republic of Sakha-Yakutia − and specifically to the city of Yakutsk. In-depth interviews revealed that the Tsarvshyan family from Village 2 were among the first labour migrants to settle in Yakutsk. Their assistance and facilitation resulted in about 20 families from the village moving and settling in Yakutsk within a few years.

According to representatives from the Village 2 municipality, approximately 4,000 migrants from Village 2 have settled in Sakha-Yakutia, leading to the colloquial reference of Yakutsk as 'the second Village 2'. Notably, there are businessmen from Village 2 in Yakutsk, one of whom, as shared by Village 2 residents, employs about 700 labour migrants annually, many of whom stay permanently in Yakutsk. Philanthropic activities, such as providing financial support, are common and recurring practices in this community.

During our interviews, many residents of Village 2 mentioned that their relatives chose Yakutsk not by chance but because they had pre-existing connections with the region. For example, Grigor, a 60-year-old man, shared the story of his brother − who migrated to Yakutsk in the 1990s − and reflected on his family's experience:

> *My brother's decision to settle in Yakutsk from Village 2 was not accidental, as our family has had connections with the region since the 1970s. My grandfather was one of the first migrant workers to go there during that period and, later, my father continued the family's business, establishing a significant construction company in Yakutsk. Many people from our village now live and work in Sakha-Yakutia. We maintain strong connections with them and I frequently see many of our relatives there. They gather and celebrate various events, such as birthdays and holidays. In Yakutsk, our former neighbours and my brother live side by side. Those who left the village have not abandoned their houses; instead, they have renovated them because they often return in the summer with their children. Moreover, most of the migrants living in Yakutsk not only maintain close ties with their village but also contribute financially to improve amenities in the village, such as repairing drinking-water pipes, schools and roads.*

From Village 3, in the Gegharkunik region, three generations have already emigrated to regions where their grandparents settled since the early 1970s. Our research reveals that their main migration destinations include the Nizhny Novgorod, Tyumen and Yekaterinburg regions of the Russian Federation. In Nizhny Novgorod alone, approximately 400 families from Village 3 have settled permanently, with around 200 families in the Tyumen region and 120 families in Yekaterinburg. The emigrants from Village 3 have played a significant role in the formation of Armenian communities in these regions of Russia. Notably, the first settlers accumulated wealth and established large construction companies in these cities, which contributed to the establishment of Armenian community organisations. During an interview, a 47-year-old female resident from Village 3 shared her thoughts about the migration situation in their village and the community in Nizhny Novgorod:

> *Most of our villagers have migrated to Russia and many families from our village have settled in Nizhny Novgorod. My brother also lives there with his family and is engaged in trade. There are wealthy former residents of Village 3 who are actively involved in the Armenian community and utilise their connections with the local administration for the development of the community. They also provide assistance to underprivileged families in our village.*

The 60-year-old headmaster of the Village 3 school shared the story of the migration routes, their organisational basis and the philanthropic and charity activities and development projects led by these organisations. The interview highlights how migrants have developed diasporic organisations and used their ability to mobilise fellow diaspora members for common causes, leading to organised action driven by ties of co-responsibility (Werbner 2002).

I have been the headmaster of this school for 20 years and I am very aware of the families from our village who settled in Russia and the children who left school. They left our village to work abroad in Russia back in the Soviet period and were mainly engaged in construction. After the collapse of the Soviet Union and the worsening economic situation in Armenia, the number of expatriate workers increased dramatically. At first, men went, then they took their families for permanent residence and established a compact settlement in the Russian Federation. In order to preserve the Armenianness of the children and teach them their native language and history, they gathered with local Armenians and started a Sunday School there. They always celebrate our national and religious holidays. Due to the direct support of the people from our village engaged in business in Russia and the connections with the local authorities, they created patriotic charitable and cultural associations, collected money to build a church and published a newspaper in the Armenian language.

About 40,000 Armenians currently reside in the Omsk region of Russia. During an interview in Village 4, the former head of the Armenian community in Omsk shared how he had been leading construction brigades of about 20−30 people from Armenia to Omsk for many years, starting in the 1970s. Eventually, he settled in Omsk permanently and relocated his family and relatives to the region. He played a vital role in uniting the local Armenians and establishing an informal Armenian migrants' network. Through his efforts, he later successfully registered a cultural centre, a Sunday school and an Armenian Apostolic Church. As one 70-year-old women interviewed from Village 4 recounted, her son was also among the migrants who left the country due to these ethnic networks:

My son decided to permanently move from Village 4 to the Omsk region because he was unemployed in our village. My cousin suggested that he join him, as he owns a chain of shops there and is actively involved in Armenian community organisations in Omsk. Upon my son's arrival, they quickly found a job for him within the same chain and he declared that living there is very comfortable since many former residents from our and neighbouring villages have settled in Omsk as well. Moreover, my grandchildren are already attending dance and vocal classes and are learning about Armenian history in Omsk.

Currently, the Armenian community in Omsk is not homogeneous, as it comprises people from different villages and cities of the Gegharkunik region. Consequently, the community has developed its intra-community structure, where distinct intra-ethnic groups have formed family and business networks. An illustration of this diversity is evident in the leadership transition within the Armenian community in Omsk, where the former head was succeeded by a businessman from the Gegharkunik region. According to the former head of the Armenian community in Omsk, approximately 15,000 Armenians residing in Omsk originate from Gegharkunik and this change in leadership reflects their significant presence in the community.

In 2016, after the elections in Armenia, the governor of Omsk visited the Gegharkunik region with a delegation, which included the head of the Armenian community. This visit led to the signing of a memorandum of cooperation between Omsk and Gegharkunik and the head of the community received a diploma from the governor of Gegharkunik in recognition of his contributions. Subsequently, in 2022, a delegation from Gegharkunik, headed by the governor, made an official visit to the Omsk region, where they met with members of the Armenian community, as this woman aged 51 explains:

Many families from our village, Village 4, now reside in Omsk. It feels as if our village is divided, with one part here and the other part in Russia. This connection has formed our diaspora − and the community there, along with its leadership, maintains strong ties with the village. Whenever the village is in need, they

provide direct help; this was especially evident when we were building a church. A fundraiser was organised and the list of participants was proudly displayed on the door of the village hall.

The cases discussed above illustrate that contemporary Armenian communities in Russia do not rely solely on old and well-established traditional institutions that were developed in historical diaspora settings (e.g., the Armenian Revolutionary Federation). Instead, they have given rise to recently developed organisations, often operating through informal networks. These newly formed communities and organisations carry Armenian names (e.g., AniArmenia) which are often related to significant historical events (e.g., Sardarapat) or the birthplace of a benefactor (e.g., Tashir).

In their homeland engagement strategies, these groups, based on regional origin, compete to elect community leaders. The preservation of traditions, culture and language remains a primary goal for these organisations, though it is not their exclusive focus. Another vital aspect of their activities revolves around their cooperation with state authorities, lobbying efforts, fundraising and various forms of mediation on behalf of their fellow countrymen.

Conclusion

We propose that diaspora studies and migration studies can greatly benefit from exploring the Armenian diaspora experience, particularly by examining the actual trajectories of migrants arriving in their destination countries and how both migrants and their descendants establish networks and foster communities based on ethnic ties. Our study contributes to the existing literature on migration and diaspora studies in 3 significant ways. Firstly, it sheds light on the enduring nature of networks across generations, demonstrating how Armenian migration networks have evolved since the era of the Soviet Union. Secondly, it highlights how migrants' kinship networks play a crucial role in shaping the organisational foundations of these communities, with leadership roles often emerging from sub-community networks based on the regions of origin of the migrants. Thirdly, our research delves into the engagement preferences of the diaspora, illustrating the willingness of recently formed communities to actively connect with their specific regions or villages of origin.

The quantitative research findings suggest that the survey participants considered their networks abroad as a crucial factor in their decision to emigrate. The study reveals that ethnic networks significantly influence the migration strategies of migrants from different villages and regions in Armenia when selecting their destination in Russia. Each group is likely to have its distinct migratory direction and favoured locations for permanent residence within the Russian Federation, shaped by their unique migration strategies. While a particular region of the country might be well-known and preferred by one group of migrants, it may not hold the same appeal for others. As a result of these migration strategies, different families and individuals from the same Armenian place of origin settle in distinct regions of the Russian Federation in a compact manner. The successful migration of pioneer migrants has a ripple effect, influencing the decision-making of potential emigrants from Armenia and leading to the expansion of migration flows.

This research sheds light on the role of ethnic networks within Armenian communities in Russia and provides insight into the enduring nature of ethnic ties that persist over generations between home communities and destination countries. It demonstrates that Armenian migrants have established strong connections since the Soviet era, shaping the migratory behaviour and destinations of their family members, relatives and fellow community members back in Armenia.

The study emphasises the significance of ethnic identity as a crucial factor in shaping and sustaining diaspora communities. The organisational basis of the communities that are founded on ethnic networks often differs from transnational traditional diasporic organisations as they often rely on personal relationships

between co-ethnic individuals. They play a role in consolidating and accumulating resources within communities, as well as aiding their home communities. The presence of ethnic groups and their networks serves as a significant economic, social and cultural resource in Russia. Some cases also demonstrate that these networks or organisations act as hometown associations, not only mobilising resources to build communities in destination countries but also providing direct material and non-material support to the regions, cities and villages in their home countries. Their attachment to specific regions of origin is a distinct feature of post-Soviet migration that sets it apart from traditional diasporas, as the latter typically consist of third-generation Armenians who have become disconnected from their original communities in Armenia. In contrast, the newly established Armenian communities in the Russian Federation maintain a strong connection with their places of origin. This bond is reinforced by the fact that many of their family members and relatives continue to reside there. As a result, these migrants actively engage in direct financial investments to foster the growth and development of their communities of origin, as well as to support the implementation of various new projects.

This article also highlights the necessity for further research to enhance our understanding of the relationships between ethnic networks and diaspora formation ties. It suggests focusing on several understudied aspects of migrants' sub-communities based on kinship and friendship networks, including identity politics, organisational foundations built on formal and informal networks, engagement priorities and practices, connections and disconnections with their homelands. Additionally, the study can analyse and compare other diasporic migration and sub-community networks with the case of Armenian post-Soviet migration, such as the Turkish, Mexican and Chinese diasporas.

In our study, it is important to acknowledge the limitation regarding not fully capturing the perspectives and experiences of individuals from the older diaspora or those who migrated with their entire families. This limitation could impact on our findings, as these groups may hold unique insights and varied migration experiences. Future research should consider broader inclusion criteria to encompass a more diverse range of migrants and diaspora members.

Funding

This work was supported by the RA Science Committee, in the frames of the research project entitled 'The Problem of Emigration from Post-Soviet Armenia in the Context of the Diaspora's Ethnic Networks' No. 20TTSH-040.

Conflict of interest statement

No conflict of interest was reported by the authors.

ORCID IDs

Mihran Galstyan https://orcid.org/0009-0009-1537-2847
Nare Galstyan https://orcid.org/0000-0003-4433-9009
Gayane Hakobyan https://orcid.org/0009-0009-0663-5377

Notes

1. There were 763 584 households in the Republic of Armenia according to the 2011 census (Armstat 2011).
2. The geography of emigration from Armenia is quite comprehensive, encompassing 35 countries, as indicated by these research findings. The primary destinations and their respective percentages are as follows: the Russian Federation (61.0 per cent), the USA (9.2 per cent), Germany (7.2 per cent), France with (4.9 per cent), Spain and Ukraine (2.7 per cent each) and Belgium and Greece (1.3 per cent each). Additionally, Poland received 1.1 per cent of the emigrants. Other countries such as China, Georgia, Kazakhstan, the Netherlands, Canada, Turkey, Belarus, England, Abkhazia, Switzerland, the UAE, India, Bulgaria, Sweden, the Czech Republic, Austria, Mexico, Ireland, Syria, Israel, Turkmenistan, Italy, Latvia, Cyprus, Denmark and Liberia had emigration rates below 1.0 per cent.
3. The Armenian Revolutionary Federation has been a transnational organisation since its inception in 1890, with established affiliates in more than 20 countries (Tölölyan 2000).
4. The Armenian General Benevolent Union was established in Cairo, Egypt, in 1906 as a non-profit organisation and is currently present in 31 countries (AGBU 2021).

References

Agadzhanyan L.A. (2016). Armyanskaya Obshchina v Samare: Istoriya i Etnokul'urnye Aspekty Razvitiya (Seredina XIX-nachalo XX v.). Samara: University of Samara, unpublished PhD thesis.

AGBU (2021). Our Mission. https://agbu.org (accessed 30 June 2023).

Aleqsanyan H. (2014). The Armenian Communities in the Soviet Republics 1917–1941. Yerevan: University of Yerevan, unpublished PhD thesis.

Ambrosini M. (2017). Europe: No Migrant Land? Novi Ligure: Edizioni Epoké.

Ambrosini M. (2018). Irregular Immigration in Southern Europe: Actors, Dynamics and Governance. Cham: Palgrave Macmillan.

Anderson B. (2020). Imagined Communities: Reflections on the Origin and Spread of Nationalism, in: S. Seidman, J.C. Alexander (eds), The New Social Theory Reader, pp. 282–288. London: Routledge.

Armstat (2011). The Results of 2011 Population Census of the Republic of Armenia (Indicators of the Republic of Armenia). https://armstat.am/en/?nid=532 (accessed 28 April 2024).

Armstat (2020). Armenia's Social Picture and Poverty. https://armstat.am/file/article/poverty_2020_a_2..pdf (accessed 28 April 2024).

Armstrong J.A. (1976). Mobilized and Proletarian Diasporas. American Political Science Review 70(2): 393–408.

Bakewell O., de Haas H., Kubal A. (2012). Migration Systems, Pioneer Migrants and the Role of Agency. Journal of Critical Realism 11(4): 413–437.

Brinkerhoff J.M. (ed.) (2008). Diasporas and Development: Exploring the Potential. Boulder: Lynne Rienner.

Brubaker R. (2005). The 'Diaspora' Diaspora. Ethnic and Racial Studies 28(1): 1–19.

Brubaker R. (2006). Ethnicity without Groups. Harvard: Harvard University Press.

Bruneau M. (2010). Diasporas, Transnational Spaces and Communities. Diaspora and Transnationalism: Concepts, Theories and Methods 3(1): 35–50.

Bzarov R.S. (2019). O Formirovanii Armyanskoy Obshchiny vo Vladikavkaze. Vestnik Severo-Osetinskogo Gosudarstvennogo Universiteta Imeni KL Khetagurova 2: 20–24.

Castles S., Arias Cubas M., Kim C., Ozkul D. (2012). Irregular Migration: Causes, Patterns, and Strategies, in: I. Omelaniuk (ed.), Global Perspectives on Migration and Development, pp. 117–151. Dordrecht: Springer.

Cavoukian K. (2013). 'Soviet Mentality'? The Role of Shared Political Culture in Relations Between the Armenian State and Russia's Armenian Diaspora. Nationalities Papers 41(5): 709–729.

Cheung G.C. (2004). Chinese Diaspora as a Virtual Nation: Interactive Roles between Economic and Social Capital. Political Studies 52(4): 664–684.

Chuatico G., Haan M. (2022). Bonding Social Ties: Relative Human Capital and Immigrant Network Choices. Journal of Ethnic and Migration Studies 48(7): 1690–1710.

Collins J. (2002). Chinese Entrepreneurs: The Chinese Diaspora in Australia. International Journal of Entrepreneurial Behaviour and Research 8(1/2): 113–133.

Dagnelie O., Mayda A.M., Maystadt J.F. (2019). The Labor Market Integration of Refugees in the United States: Do Entrepreneurs in the Network Help? European Economic Review 111: 257–272.

Damm A.P. (2009). Ethnic Enclaves and Immigrant Labor Market Outcomes: Quasi-Experimental Evidence. Journal of Labor Economics 27(2): 281–314.

Davis B., Winters P. (2001). Gender, Networks, and Mexico–US Migration. Journal of Development Studies 38(2): 1–26.

De Haas H. (2007). Turning the Tide? Why Development Will Not Stop Migration. Development and Change 38(5): 819–841.

De Haas H. (2009). Migration Systems Formation and Decline. A Theoretical Inquiry into the Self-Perpetuating and Self-Undermining Dynamics of Migration Processes. Oxford: University of Oxford, International Migration Institute Working Paper No. 19.

De Haas, H. (2010). Migration Transitions: A Theoretical and Empirical Inquiry into the Developmental Drivers of International Migration. Oxford: University of Oxford, International Migration Institute Working Paper No. 24.

Demoscope (1992). All-Population Census 1939, 1959, 1970, 1992. https://www.demoscope.ru/weekly/pril_rus.php (accessed 28 April 2024).

Demoscope (2000). All-Population Census 2000. https://www.demoscope.ru/weekly/pril_rus.php (accessed 28 April 2024).

Demoscope (2010). All-Population Census 2010. https://www.demoscope.ru/weekly/pril_rus.php (accessed 28 April 2024).

Dennison J. (2022). Re-Thinking the Drivers of Regular and Irregular Migration: Evidence from the MENA Region. Comparative Migration Studies 10(1): 1–29.

Fawcett J.T. (1989). Networks, Linkages, and Migration Systems. International Migration Review 23(3): 671–680.

Fitzgerald D. (2008). Colonies of the Little Motherland: Membership, Space, and Time in Mexican Migrant Hometown Associations. Comparative Studies in Society and History 50(1): 145–169.

Galstyan N., Ambrosini M. (2023). Diasporas and Collective Remittances: From State-Driven to Unofficial Forms of Diaspora Engagement. International Migration Review 57(2): 652–680.

Galstyan M, Hakobyan G., Mnatsakanyan L., Galstyan N. (2022). The Emigration Problem of Post-Soviet Armenia's Population: The Network Migration Context. Yerevan: Institute of Archaeology and Ethnography of the Republic of Armenia.

Gerber D.A. (2021). American Immigration: A Very Short Introduction. New York: Oxford Academic.

Gericke D., Burmeister A., Löwe J., Deller J., Pundt L. (2018). How Do Refugees Use Their Social Capital for Successful Labor Market Integration? An Exploratory Analysis in Germany. Journal of Vocational Behavior 105: 46–61.

Hall S. (1994). Cultural Identity in Diaspora, in: P. Williams, L. Chrisman (eds), Colonial Discourse and Post-Colonial Theory, pp. 401–402. New York: Columbia University Press.

Hoffman M., Makovsky A., Werz M. (2020). The Turkish Diaspora in Europe: Integration, Migration, and Politics. Center for American Progress. https://www.americanprogress.org/issues/security/reports/2020/12/10/491951/turkish-diaspora-europe/ (accessed 28 April 2024).

Kanaiaupuni S.M. (2000). Sustaining Families and Communities: Nonmigrant Women and Mexico–US Migration Processes. Madison-Wisconsin: University of Madison-Wisconsin, Center for Demography and Ecology Working Paper No. 2000-13.

Kesici M.R. (2021). The History of Migration from Turkey to Western Europe: A Multi-Theoretical Analysis of the Routes to Germany and the United Kingdom. Border Crossing 11(2): 173–190.

Khachatryan V., Ananyan J., Sargsyan A., Khudaverdyan K. (2003). The Encyclopaedia of Armenian Diaspora. Yerevan: Armenian Encyclopaedia Publishing.

Kilic H., Biffl, G. (2021). Turkish Migration Policy from the 1960s until Today: What National Development Plans Tell Us. Journal of International Migration and Integration 23(4): 1–27.

Köngeter S., Smith W. (2015). Transnational Agency: Migrants, Movements, and Social Support Crossing Borders, in: S. Köngeter, W. Smith (eds), Transnational Agency and Migration, pp. 1–20. New York: Routledge.

Kuschminder K., De Bresser J., Siegel M. (2015). Irregular Migration Routes to Europe and Factors Influencing Migrants' Destination Choices. Maastricht: Maastricht Graduate School of Governance.

Libardian J. (1999). The Challenge of Statehood. Armenian Political Thinking Since Independence. Massachusetts: Blue Crane Books.

Lourie S. (1999). Armenian Community in Saint-Petersburg (1989–1993). Ethnic Self-Identification During 'the Ethnos Crisis'. http://svlourie.narod.ru/armenina-myth/diaspora.htm.

Massey D.S. (1987). Understanding Mexican Migration to the United States. American Journal of Sociology 92(6): 1372–1403.

Massey D.S. (1999). Why Does Immigration Occur? A Theoretical Synthesis, in: C. Hirschman, P. Kasinitz, J. DeWind (eds), The Handbook of International Migration: The American Experience, pp. 34–52. New York: Russell Sage Foundation.

Massey D.S., Arango J., Hugo G., Kouaouci A., Pellegrino A., Taylor J.E. (1994). An Evaluation of International Migration Theory: The North American Case. Population and Development Review 20(4): 699–751.

Miqaelyan V. (2003). The History of the Armenian Exile from the Middle Ages to 1920. Yerevan: Gitutyun Publishing House.

Panossian R. (2003). Courting a Diaspora: Armenia–Diaspora Relations since 1998, in: E. Østergaard-Nielsen (ed.) International Migration and Sending Countries, pp. 140–168. London: Palgrave Macmillan.

Portes A. (1998). Social Capital: Its Origins and Applications in Modern Sociology. Annual Review of Sociology 24(1): 1–24.

Ryan L., Eve, M., Keskiner E. (2022). Introduction: Revisiting Networks: Setting the Conceptual and Methodological Scene, in: E. Keskiner, M. Eve, L. Ryan (eds), Revisiting Migrant Networks: Migrants and Their Descendants in Labour Markets, pp. 1–22. Cham: Springer.

Ryan L., Sales R., Tilki M., Siara B. (2008). Social Networks, Social Support and Social Capital: The Experiences of Recent Polish Migrants in London. Sociology 42(4): 672–690.

Safran W. (1991). Diasporas in Modern Societies: Myths of Homeland and Return. Diaspora: A Journal of Transnational Studies 1(1): 83–99.

Shain Y. (1994). Marketing the Democratic Creed Abroad: US Diasporic Politics in the Era of Multiculturalism. Diaspora: A Journal of Transnational Studies 3(1): 85–111.

Sieber J.E. (1994). Will the New Code Help Researchers to Be More Ethical? Professional Psychology: Research and Practice 25(4): 369–375.

Siekierski K., Troebst S. (eds) (2016). Armenians in Post-Socialist Europe. Cologne, Weimar, Vienna: Böhlau Verlag.

Smith P.A. (1986). The Palestinian Diaspora, 1948–1985. Journal of Palestine Studies 15(3): 90–108.

Tolich M. (2004). Internal Confidentiality: When Confidentiality Assurances Fail Relational Informants. Qualitative Sociology 27(1): 101–106.

Tölölyan K. (2000). Elites and Institutions in the Armenian Transnation. Diaspora: A Journal of Transnational Studies 9(1): 107–136.

Tölölyan K., Papazian T. (2014). Armenian Diasporas and Armenia: Issues of Identity and Mobilization. An Interview with Khachig Tölölyan. Études Arméniennes Contemporaines 1(3): 83–101.

Torosyan T., Vardanyan A. (2020). Peculiarities of Transforming Diasporas: The Case of the Armenian Diaspora. Diaspora Studies 13(1): 59–71.

Triandafyllidou A. (2015). Migrant Smuggling, in: A. Triandafyllidou (ed.), Routledge Handbook of Immigration and Refugee Studies, pp. 370–377. New York: Routledge.

Van Hear N., Cohen R. (2017). Diasporas and Conflict: Distance, Contiguity and Spheres of Engagement. Oxford Development Studies 45(2): 171–184.

van Uden J., Jongerden J. (2021). 'Everyone is a Possibility': Messy Networks of Refugees from Syria in Urfa, Turkey. Journal of Balkan and Near Eastern Studies 23(2): 251–268.

Vertovec S. (1997). Three Meanings of 'Diaspora', Exemplified Among South Asian Religions. Diaspora: A Journal of Transnational Studies 6(3): 277–299.

Vertovec S. (2002). Transnational Networks and Skilled Labour Migration. Oxford: University of Oxford.

Werbner P. (2002). The Place Which Is Diaspora: Citizenship, Religion and Gender in the Making of Chaordic Transnationalism. Journal of Ethnic and Migration Studies 28(1): 119–133.

Wolgin P.E. (2011). Beyond National Origins: The Development of Modern Immigration Policymaking, 1948–1968. Berkeley: University of California Berkeley History Department, unpublished PhD thesis.

Yeganyan G. (2020). Migration Situation and Population Movement Management Strategies in RA. Messenger of Armenian State University of Economics 33(3): 53–54.

Zakhar'yan I.E. (2013). Natsional'no-Kul'turnoe O'yedinenie kak Institut Inklyuzii Migrantov (na Primere Armyanskoy Obshchiny 'Krunk' Saratovskoy Oblasti). Zhurnal Issledovaniy Sotsial'noy Politiki 11(2): 221–234.

Zapata-Barrero R., Yalaz E. (2018). Qualitative Research in European Migration Studies. Cham: Springer.

How to cite this article: Galstyan M., Galstyan N., Hakobyan G. (2024). From Roots to Routes: The Role of Ethnic Networks in the Development of Migrant Communities in Russia. *Central and Eastern European Migration Review* 13(1): 169–188.

Central and Eastern European Migration Review
Received: 21 March 2023, Accepted: 28 March 2024
Published online: 23 April 2024
Vol. 13, No. 1, 2024, pp. 189–210
doi: 10.54667/ceemr.2024.05

‘For a Secure and Stable Life’: Constructing Life Satisfaction in the ‘Migratory Careers’ of Russian Immigrant Physicians in Finland

Driss Habti*, Nina Szczygiel**

This article investigates the subjective life satisfaction of Russian immigrant physicians in Finland. It focuses on how life satisfaction is subjectively experienced and interpreted post migration in a bid to identify the resources which influence it in both work and family domains. The advantage of life satisfaction is taking it as a unifying cross-disciplinary conceptual framework and as a multidimensional analytical approach, including macro-societal, meso-relational, and micro-personal levels. We use the concept of the migratory career to analyse work and family life on migration journeys. These life evaluations are analysed using a sociological conception of subjective life satisfaction and a psychological conception of wellbeing as guiding principles in theory and analysis. Based on 26 semi-structured qualitative interviews, the study finds that an interplay between societal-structural and personal-relational resources makes the interviewees satisfied with their work and family lives. Societal-structural resources included the work environment, income, life security and stability, while personal-relational resources included social support, social trust, and family relationships. Beyond the classical income and job security, we find our participants’ experienced and interpreted life satisfaction is essentially associated with outcomes of family-friendly and supportive work conditions. Moreover, social and personal security and family stability are important for their quality of life in a characteristic Nordic social environment.

Keywords: subjective life satisfaction, migratory career, Russian immigrant physicians, resources, work and family domains, qualitative approach

* University of Eastern Finland, Finland. Address for correspondence: driss.habti@uef.fi.
** University of Aveiro, Portugal. Address for correspondence: nina.szczygiel@ua.pt.

Introduction

With the increasing international migration of physicians since the 1990s (Klein 2016; Walton-Roberts, Runnels, Rajan, Sood, Nair, Thomas, Packer, MacKenzie, Tomblin-Murphy, Labonté and Bourgeault 2017), research focus across disciplines has often surrounded the underlying aspirations and capabilities for human development in the migration context (de Haas 2021) as well as outcomes of their experiences in receiving countries over time, including employability, occupational mobility and life adjustments (Mozetič 2018). However, bodies of literature on work trajectories and their connections with family life dynamics through the life-course have grown (Han and Mortimer 2023), detaching from the academic tradition of labour-market integration in disciplinary areas such as human-resource management and development (Habti 2021). Furthermore, beyond career opportunities, the 'human face' of the subjective approach to migration experience of social life (Favell, Feldblum and Smith 2007) has increasingly focused research attention on work and family domains (Bolzani, Crivellaro and Grimaldi 2021; Habti 2021; Ivana 2020), as scholars traditionally presumed that highly skilled immigrants do not experience challenges. Being highly skilled may indicate a successful career progression and upward social mobility, socio-cultural adjustment, and supposedly positive life-satisfaction outcomes. However, these studies often compare immigrants' pre-migration conditions in their sending countries to their early-phase post-migration conditions in receiving countries, using quantitative analysis of the immigrants' work experiences.

Though important, such line of research suffers from two drawbacks. First, it quantitatively analyses changes in working life and income, but overlooks other significant life dimensions, as in the context of Finland. Quantitative studies on wellbeing among immigrant physicians in the workplace have burgeoned in the last 10 years or so, being predominantly led by healthcare researchers. Some found negative psycho-social wellbeing among 'foreign-born' physicians in the work environment – mainly mental stress and physical strain (Aalto, Heponiemi, Keskimäki, Kuusio, Hietapakka, Lämsä, Sinervo and Elovainio 2014) – symptoms which may be associated with an intention to leave one's job or even the country (Heponiemi, Hietapakka, Kaihlanen and Aalto 2019). Other research suggests that highly skilled immigrants in Finland experienced difficulties in socio-cultural adjustment in the workplace (e.g., Lahti 2013) and beyond (e.g., Habti 2014a; Koskela 2019) due to socio-cultural identity(ies) negotiations, which affect the individual's wellbeing (Neira, Bruna, Portela and Garcia-Aracil 2018). Most studies addressed objective indicators using quantitative approaches in the variations in individual characteristics among these immigrants' socio-psychological stressors at work. However, while the migration of physicians from Eastern to Western Europe is generally found to be associated with better career and life opportunities (Habti 2019; Klein 2016), the issue of what multidimensional migration outcomes in life satisfaction they essentially experience over time in the receiving countries, apart from work and in relation to their connectedness with their origin countries, still stands.

Concerning the second major downside that extant research has in line with subjective approach to migration experiences, quantitative cross-sectoral or longitudinal research abundantly examined the drivers and outcomes of social integration and life satisfaction among various immigrant groups in receiving countries (Hendriks, Burger, Ray and Esipova 2018). Largely focusing on differences in income levels and welfare benefits between countries (Amit 2010; Bartram 2015; Hendriks and Bartram 2016; Hendriks *et al.* 2018), such research often links life satisfaction in receiving countries to a better life situation and future, often highlighting the role of macro-societal conditions in both receiving and sending countries on life satisfaction (Kogan, Shen and Siegert 2018; Safi 2010). Interestingly, such research showed conflicting results when comparing subjective life satisfaction among immigrant communities, often underlining macro-societal conditions only (Amit 2010; Arpino and de Valk 2018; Safi 2010). In the Russian highly skilled migration context, researchers have observed that socio-economic and macro-societal conditions influenced the intention

to migrate (Amit 2010; Otrachshenko and Popova 2014), whereas others found that emigration is driven by other incentives than the socio-economic (Bartram 2015; Mihăilă 2019). Approaching subjective life satisfaction from a quantitative macro-societal perspective leaves an important void because it does not comprehensively account for other meaningful life dimensions of experienced and interpreted life satisfaction across social settings, which might be more important for the immigrants and those close to them in their present and future life prospects. Additionally, a quantitative approach does not consider immigrants' subjective life evaluations, grounded upon major life-events and transformations, and presenting the immigrants as social agents actively trying to meet their life goals and needs and to overcome challenges in their migratory journeys, often with reference to their origin country.

Because it is often studied as the best indicator of an individual's perceived quality of life (Bartram 2015; Pavot and Diener 2008), positive life satisfaction is the most significant goal in human life according to the psychological theory of social production function (Ormel, Lindenberg, Steverink and Verbrugge 1999). The theory stipulates that people produce their wellbeing by trying to increase the achievement of universal goals with an ensemble of resources they have, despite constraints which they encounter. For example, subjective life satisfaction is considered a key factor of and outcome for upward social mobility (Hadjar and Samuel 2015) and self-realisation (Sirgy 2021) in one's life. Taking a sociological perspective, Veenhoven (2012) defines subjective life satisfaction as a person's subjective evaluations of life on their chances for a good life. He advances that the key to happiness is combining a 'liveable environment' (external conditions) and 'life-abilities' (internal conditions). Inspired by these sociological and psychological theories of life satisfaction and wellbeing, our study uses a cross-disciplinary conceptual framework that ranges from sociological and psychological underpinnings, alongside a multidimensional analytical approach that interplays between the perceptual, material and relational dimensions in immigrants' life journeys which Martiniello and Rea (2014) define as *migratory careers.*

This article aims to contribute to the above-mentioned lines of inquiry by examining the subjective life satisfaction of Russian immigrant physicians – understood as the subjective appreciation of life as a whole, in its reflective, evaluative and interpretative forms (Veenhoven 2012) – in the important life domains of work and family. Cross-disciplinary theorisation and a multidimensional analysis of migration experiences of migratory career, particularly on this research question, have received limited empirical attention. The study does not concern the variations in these immigrants' subjective life satisfaction across time. Our research investigates what and how a combination of characteristic resources is perceived to influence a person's overall life satisfaction through migratory careers. Focusing specifically on Russian physicians is intriguing, as the largest foreign-born healthcare physicians, would enlighten the profession-specific aspects which shape their evaluations and allow identification of pre-migration effects. Hence, this study asks the following questions: Are these immigrants satisfied with their work and family lives post migration? If so, what resources (or factors) account for their subjective life satisfaction within these domains? This study builds on the stance that migration is neither advantageous nor disadvantageous for immigrants, while societal-structural, personal and relational resources are elemental in experienced and interpreted life satisfaction at different stages of life.

The study analyses the subjective experiences and evaluations of life satisfaction among Russian immigrant physicians, characterised by diverse biographies and migration trajectories, in order to understand under what conditions their life satisfaction outcomes of migration are achieved in such characteristic life domains as work and family. Considering the limited research using qualitative biographical approaches to investigate highly skilled immigrants' subjective life satisfaction, this study relies on their perceptions and experiences through semi-structured interviews with 26 participants. A biographical approach allows the analysis of their overall life evaluations under the changing conditions of lived migration experiences. Moreover, an interpretative analysis (Denzin 1989) of the long-term outcomes of migration in their work and family lives may illuminate

how their life satisfaction is subjectively experienced and interpreted, with a focus on the subtleties of narrative accounts rather than the metrics of quantitative data. Against this backdrop, a qualitative approach to subjective life satisfaction is important for identifying and analysing the interplay of individual characteristics and structural forces that may promote or challenge the life satisfaction in work and family domains in the immigrants' lived experiences in Finland.

In what follows, we present a theoretical literature review drawing on the relevant sociological and psychological dimensions of subjective life satisfaction in a migration context; we also elaborate on the concept of the migratory career and its theoretical and analytical approach for better understanding our research objectives. We then sketch out a brief discussion on the situation of Russian immigration in Finland, after which we describe the original qualitative data, sample and qualitative method used for our empirical analysis. Next come the main results and analysis of our participants' life evaluations, particularly the perceived resources of life satisfaction, placed within the broader framework of their biographical accounts; this is followed by our concluding remarks. The findings show that, overall, Russian immigrants experienced and interpreted their life satisfaction positively. Interestingly, though a good income and work environment are significant resources and drivers behind migration, they conceive that their life satisfaction is mostly promoted by family-related resources thanks to a cherished sense of personal and relational security and stability in life.

Navigating life satisfaction in migratory career in the life domains of work and family

As previous research on wellbeing/life satisfaction has largely focused on objective evaluations from quantitative metrics, an interacting multidimensional analysis and cross-disciplinary theorisation to analyse immigrants' subjective life satisfaction from biographic narratives remains under-explored. We propose a framework that combines sets of explanatory factors and/or resources to allow comprehensive analysis of their experienced and interpreted life satisfaction in their *migratory careers*.

Subjective life satisfaction in the migratory career: a holistic multidimensional lens

Martiniello and Rea introduced the concept of the *migratory career* based upon the sociological concept of the *career* by proposing a multidimensional conceptual apparatus in theoretical linkage between the migration process and lived experiences, as an addition to concepts of trajectory and integration. They define the *migratory career* as 'a sequence of steps, each marked by events that are defined as significant within the structure of the actors' narratives and publicly recognised as such by various audiences' (2014: 1083). They explain how the migratory career provides added value to the multidimensional analysis of the social reality of immigrants' experiences from macro-structural (opportunity structures and barriers), meso-relational (social relationships, networks) and micro-individual (agency, personal characteristics) levels. These resources develop the migratory career in an interactive way. In our study, we explore the specific needs and goals that immigrants consider important for life satisfaction and how they shape and are shaped by the migration process. The concepts of incorporation or integration have focused on receiving countries as the departure point, while overlooking immigrants' life experiences in the sending country before migration. Instead of approaching migration as linear and unidirectional (de Haas 2021; Habti 2018), the migratory career is a theoretical and analytical tool that allows an understanding of the complex multidirectional, idiosyncratic and dynamic migration process.

As a conceptual tool, the migratory career provides an extended analysis with which to reconstruct the experienced 'career' of immigrants as part of the work–family life course (Habti 2018; Han and Mortimer 2023). The first dimension of the migratory career is that it is constructed objectively by legal-institutional and

socio-economic pathways and is subjectively grounded on early migration expectations and post-migration experiences. This subjective dimension allows a deep understanding of the migratory career as a diachronic construct in constant transformation. In this way, we differentiate between the concept of the career and that of the trajectory which focuses solely on the objective dimension and thus limits the analysis to steps in the migration and settlement processes to the detriment of transformations related to forms of social identity(ies). To illustrate, the first-born child for highly skilled immigrant mother has greater importance in the definition of her relational identity than her professional identity, as it has greater influence than other aspects in orienting her migratory career (Habti 2014a). Her new subjective identity could be freedom, prioritising stability of family more than occupational and socio-economic gains. Thus, the migratory career is useful in identifying and analysing not only pecuniary resources influencing life satisfaction but also the non-pecuniary dynamic processes in immigrants' experiences related to identity development, socio-cultural adjustment, way of life and particular agentic strategies in their narratives.

The second dimension of the migratory career which Martiniello and Rea (2014) propose is the concept of success and failure. Highly skilled immigrants often mobilise forces and strategies that motivate their career. Thus, the career as a process aims for achievement grounded on objective and subjective conditions. As shown later, the migratory career is built upon manifold goals, not only the pursuit of career progression but possibly self-realisation, recognition and social identities which nurture life satisfaction. It bears varying degrees of subjective and objective success from immigrants' subjective evaluations across life domains. Analysing the migratory career requires consideration of the values and norms in receiving and sending countries. Some immigrants may link their career success to socio-economic success, whereas others conceive it as self-achievement and a social status (Hadjar and Samuel 2015). Educational credentials and work are major factors explaining an immigrant's social mobility although perceived subjective success could be based on the social norms and values rooted in society in both the receiving and sending country – i.e. a hybrid culture or that of only the origin country (de Haas 2021; Habti 2014b). Such a process situated in immigrants' practices are major founding elements of identity(ies) development and socio-cultural adaptation, hence shaping their personal–relational resources and frame of reference for analysing subjective life satisfaction (e.g., Hajro, Stahl, Clegg and Lazarova 2019). Research needs to analyse both the life situations regarding immigrants' needs and goals and the criteria used to define success over time, such as the characterisation of life satisfaction outcomes from cross-disciplinary underpinnings.

Subjective life satisfaction as sociological and psychological theoretical underpinnings

Conceptually, life satisfaction has been closely linked to and often used interchangeably with subjective wellbeing, quality of life and happiness, despite the differences in philosophical and theoretical foundations between these concepts (e.g., Hendriks and Bartram 2016; Pavot and Diener 2008; Veenhoven 2012). Veenhoven (2012: 66) approaches subjective life satisfaction as 'the degree to which an individual judges the overall quality of his/her life-as-a-whole favourably', based on their personal criteria, judgments and perceptions. For psychologists (Pavot and Diener 2008) and sociologists (Veenhoven 2012) alike, satisfaction with life as a-whole is not only about how well one feels, but also about the resources and conditions available and mobilised in the life domains in which people are embedded, which may contribute to their flourishing and self-realisation. In this sense, amidst opportunities and challenges experienced as life events – for example, the migratory career – Veenhoven (2012) posits that the key to higher life satisfaction is a combination of a 'liveable environment' nurtured by opportunity structures such as societal-structural resources (e.g., social welfare, work conditions, environmental conditions) alongside 'individual life-abilities' resulting from 'life chances' and 'inner qualities' such as personal–relational resources (e.g., income, social status, social relationships,

social identities, qualifications/skills). He adds that the appreciation of life and its purpose ('utility') further contributes to life satisfaction. Hence, we assume societal–structural and personal–relational resources form the opportunity structures and outcomes of life satisfaction, which itself constitutes a major outcome in immigrants' experiences and (non-)achievement of their life aspirations and capabilities in receiving countries (de Haas 2021).

Veenhoven (2012) conceives that the role of societal–structural resources in life satisfaction derives from research findings which show that individuals in modern, liberal and wealthier countries feel happier than those living in less-rich countries – for example, based on world happiness reports. He adds that advantageous societal-structural conditions, e.g. quality healthcare and education systems, generous welfare support and social equality, built on state policies and the good functioning of services, are deemed to create a stable and safe social environment and potentially to promote human flourishing in major life domains. Although most existing research, as described earlier, underlined such advantages, empirical findings in Europe concluded that immigrants do not always benefit from a propitious and enduring work and family environment in receiving societies because the opportunity structures for wellbeing-induced gains for them are often absent (de Haas 2021). However, living in a country endowed with a propitious 'liveable environment' may help immigrants to develop personal–relational resources which could promote their life satisfaction. It can be argued that they may experience different levels of life satisfaction and outcomes on their migratory journeys, depending on their life situations and events involving macro-societal, meso-relational and micro-individual resources, as proposed by Veenhoven (2012) above. Propitious societal resources may shape personal resources in flourishing and satisfaction in major life domains. As Veenhoven (2012) argues, the interaction between life events – such as migration and employment – and personal–relational resources and capabilities may fundamentally influence life satisfaction. Hence, to understand immigrants' life satisfaction, one needs to identify the different interacting resources that support migration outcomes to which immigrants aspire and to learn how these resources influence their experienced and interpreted life satisfaction in work and family domains. These insights serve as important contextual factors related to this article's focus.

A shared thread with Veenhoven's theory is Ormel *et al*.'s (1999) psychological approach to wellbeing through their *social production function theory*. They propose that people are rational agents actively selecting cost-effective ways to promote two major needs and goals: physical and social wellbeing. They argue that status and affection are major instrumental goals, the attainment of which increases social mobility and social wellbeing – such as a sense of approval, worth, respect and prestige from others and in personal self-perceptions (1999: 67–68). Hence, the efficiency of these two instrumental goals and activities in a person's social production functions eventually influences subjective wellbeing. According to Ormel *et al*. (1999: 67), the major activities and abilities to produce status are occupation, lifestyle and excellence in life domains, while the main resources are unique qualifications and skills, which have a long-term effect on wellbeing. This approach adds to our framework for understanding how individual immigrants engage in the social production of their life satisfaction and emphasises the dynamic and strategic nature of pursuing goals and resources in various circumstances; it thus features the relevance of examining any activities shaping their subjective life satisfaction, particularly in the work domain, through their migratory careers. Veenhoven's focus on the importance of and connection between societal–structural and personal–relational resources and capabilities resonates with Ormel *et al*.'s theory that individuals strategically seek instrumental goals through available resources and activities undertaken to enhance psychological and social wellbeing. Both theories recognise the intricate connections between those resources and the pursuit of wellbeing, hence contributing to a comprehensive understanding of influential resources. The content and combination of resources in immigrants' experiences change over time, which directly influences their life satisfaction in what Veenhoven (2012) considers the major life domains: work and family.

Navigating life satisfaction in work and family domains

While life evaluations refer to people's experienced and interpreted life as a whole, they often encompass people's significant others – namely family relatives, colleagues and friends. Veenhoven (2012) observes that satisfaction in specific life domains typically contributes to overall life satisfaction and, conversely, contentment with life-as-a-whole fosters satisfaction with specific life domains. Since work and family are important domains that are intimately interrelated in people's lives, we argue that a closer investigation of domain-specific life satisfaction becomes essential in the context of highly skilled immigrants. The assumption is that such migration is driven by their aspirations and capabilities for opportunities and wellbeing elsewhere (de Haas 2021; Habti 2018; Man, Gan and Fong 2023). Thus, an analysis of domain-specific life satisfaction is imperative for a broader understanding of migration outcomes among immigrant physicians in various aspects of their work and family lives.

The work domain encompasses activities geared towards high-quality output. Warr's (1999) theoretical framework identifies significant structural resources in this domain, including income, work infrastructures and job security, together with inherent personal–relational resources like autonomy, respect, status, trust and recognition. Hence, such resources, conceptualised in Veenhoven's (2012) and Ormel *et al*'s (1999) theories, contribute to achieving instrumental goals on the path to the universal goal of social and psychological wellbeing. Migration research underscores the importance of these resources to job satisfaction, income and career progression (Wang and Jing 2018). Though subjective career success has often served as a criterion for understanding an individual's satisfaction with his or her job security, income or career progression, research has shown that immigrants' subjective life satisfaction often turns lower through time, despite their satisfaction with income (e.g., Bartram 2015; Hendriks and Bartram 2016), thus having a minimal influence on their life satisfaction. Such a change can be explained by the fact that life satisfaction may be influenced by non-pecuniary relational resources such as collegiality, trust, support, professional recognition and respect in the work environment, which all nurture a sense of esteem and self-realisation, especially considering Ormel *et al.*'s tenet that individuals' choices in pursuing wellbeing, including instrumental goals, activities and resources, are highly individualised.

Research has observed that immigrants experience and interpret work not only as a source of income but also as a measure of a successful migration outcome (Kogan *et al.* 2018; Kushnirovich and Sherman 2018). The pursuit and achievement of higher life satisfaction require fundamental resources such as rights, income and opportunities (Pavot and Diener 2008; Veenhoven 2012). For example, the literature on voluntary highly skilled migration depicts such immigrants as 'mobile' and considers their 'legal capital' such as a passport, social status and 'career capital' as a privileged class of 'global talent'. However, these immigrants also need meaningful recognition because their occupational performance and increased organisational commitment may increase their life satisfaction (Man *et al.* 2023). They need recognition when they show increased interpersonal and cooperative relationships and, particularly, social recognition as a precondition for individual autonomy and self-realisation (see Honneth 2010). As Honneth (2010) proposes, the presence of collegial norms and values shapes the trust, respect and recognition by others and their own self-esteem and, consequently, feed self-realisation in the working life. Related to the work domain, work–life balance, meaning the ability to meet personal–relational goals in balancing work and family life (Dyer, Xu and Sinha 2018) has burgeoned, as it influences people's life satisfaction (Szücs, Drobnic, den Dulk and Verwiebe 2011). For highly skilled immigrants, achieving a work–life balance is of paramount importance (Habti 2014a; Ivana 2020; Man *et al.* 2023), especially for women experiencing tensions between work and family demands (Kofman and Raghuram 2005) and trying to maintain their mental and emotional wellbeing and job satisfaction. Hence, we may ask

whether societal–structural resources are enough to make immigrant physicians overall satisfied in the workplace.

The family domain covers individuals' family relationships, household activities and responsibilities based on affection between family members. Previous studies found the causal association between family relationships and wellbeing to be family-related resources such as marriage, family structure and children's influence on the family's wellbeing (Diener and Diener-McGavran 2008). Family relationships are enduring and substantial for wellbeing on people's life courses (Thomas, Liu and Umberson 2017), because spouses with children are found to be more satisfied than those without (e.g., Pavot and Diener 2008). Migration research on the ways in which family relations and living arrangements influence immigrants' life satisfaction has burgeoned over the last two decades, although often showing mixed results. For example, marriage promotes immigrants' life satisfaction (e.g., Bartram 2015; Kushnirovich and Sherman 2018; Safi 2010) and satisfying social relations among close family and extended relatives – as well as collegial relations – are fundamental for immigrants' life satisfaction (Arpino and de Valk 2018; Neira *et al.* 2018). It is important to understand the ways in which strong family ties provide such resources through giving a sense of meaning and purpose, strengthening caregiving and yielding social support when immigrants need it (Ryan 2011). For highly skilled immigrants, strong family ties are found to increase their life satisfaction in various circumstances (e.g., Bolzani *et al.* 2021; Gerber and Ravazzini 2022; Man *et al.* 2023). Moreover, being highly skilled immigrants, social ties with extended relatives and friends are important in offering social and emotional support for them as local and transnational families (e.g., Habti 2021).

Migration studies show the importance of the psychological and social corollary of social support and trust as important resources of life satisfaction among immigrant communities (e.g., Arpino and de Valk 2018; Hombrados-Mendieta, Millan-Franco, Gomez-Jacinto, Gonzalez-Castro, Martos-Mendez and Garcia-Cid 2019; Man *et al.* 2023). Social support influences social and psychological wellbeing, especially at the family level (Thomas *et al.* 2017), while trust is grounded on the trustworthiness of one's social environments (e.g., Rodríguez-Pose and von Berlepsch 2014). Social trust fosters reciprocity, feelings of security and social cohesion between colleagues, family members and the extended community, while institutional trust involves confidence in the services of government, authorities and other social institutions in life domains. Related to trust, individuals may face safety and security concerns, such as a fear of crime or social injustice (e.g., Purkayastha 2018) or job and welfare security (Bartram 2015). As such, security, stability and safety are important social and psychological domains to consider and to investigate from the perspective of personal flourishing, social wellbeing and life satisfaction (Webb and Willis-Herrera 2012), considering that they have both accelerated global migration for safer and better life prospects. Studies on Arab highly skilled immigrants in Finland (Habti 2012) and Qatar (Babar, Ewers and Khatab 2019) showed that personal and social safety and security as psychological and social resources greatly influenced their subjective life satisfaction and decision to stay longer in their receiving countries.

Based on the above considerations, we observe that the meaning of cherishing a satisfying life appears to lie not so much on high incomes and professional positions but in the long-term social transformations in life domains (Pavot and Diener 2008) such as positive family wellbeing (Diener and Diener-McGavran 2008). Family relationships are often identified as a primary source of wellbeing/life satisfaction within these domains (Thomas *et al.* 2017), in addition to work, income, community, friends and good health. As such, the relationship between work and family satisfaction is reciprocal (Judge and Klinger 2008). Moreover, higher life satisfaction may result more from social relationships than from achievement-related domains, while life achievement can be facilitated through other means than income and occupational motivations (Sirgy 2021). As a multidimensional concept, life satisfaction is intricately related to individuals' multi-level life experiences (Szücs *et al.* 2011). Therefore, subjective evaluations of work and family lives vary across immigrants' life

journeys. This invites us to ask how Russian physicians experience and weigh up their migratory careers, within work and family domains, as being overall more satisfying than before migration, as long as they did not encounter long-term challenges and instead cherished opportunities, as they expected, in pre-migration stage. Importantly, we ask what significant societal–structural and personal–relational resources and other subjective forces influenced their experienced and interpreted life satisfaction.

Contextualising Russian migration in Finland

Finland is a Nordic country with a small homogeneous population of around 5.5 million and a foreign-born community of 3 per cent; it remained a net emigration and non-immigration country until the 1970s. However, Finland has become an attractive migration destination for Russians since the 1990s for several reasons: the longest shared EU geographical borders, ethnic repatriation, marriage, existing bilateral agreements, regulated mobility policies and the Finnish welfare system (Habti 2019). While the number of immigrants increases yearly, Russia has been the largest source country over last 30 years, from 5,500 arrivals in 1991 to almost 6,000 in 2022 (Statistics Finland 2023). Thus, they remain the largest immigrant group in Finland, representing approximately 21 per cent of the total number of immigrants. Family ties, study and work are common reasons for Russians being granted residence permits (Statistics Finland 2023). Moreover, migration increased with the repatriation of about 61,000 Finnish ethnic descendants in Russia in the 1980s. The government granted them the right to Finnish citizenship, which allowed the repatriation of 30,000 Ingrian Finns between 1990 and 2011 (Potinkara 2023). Another significant turn in the migration dynamics from Russia was Finland's membership of the EU from 1995, a change in policy environment amidst an economic boom, the strengthening of the social democratic regime and welfare and change in policy. Finland has become a migration magnet for neighbouring Russia. An EU–Russia partnership agreement in 1997 allowed Russia to develop cross-border connections with Finland in different domains. Subsequently, the inflow of Russian nationals to Finland has increased, mostly on the grounds of work and study and for family reasons (Habti 2021). These transformations coincided with the unprecedented economic, political and societal transitions in Russia during the 1990s, following the fall of the Soviet Union. Among the macro-economic and social consequences of this latter were the precarity in the work conditions due to a decline in the healthcare workforce and welfare support, an economic recession and austerity and restricted professional development opportunities (Davidova, Manning, Palosuo and Koivusalo 2009), which drove many physicians to move abroad or into other sectors (Popovich, Potapchik, Shishkin, Richardson, Vacroux and Mathivet 2011; Mihăilă 2019).

Russian physicians were the largest group of registered foreign-born accredited physicians in Finland in the 1990s and 2000s; the demand is still increasing in the labour market, mainly for generalists in primary care, due to their impending shortages (Habti 2021). However, Finland still finds difficulty in attracting and retaining foreign-born physicians because of the country's difficult accreditation procedures. The number of recruited Russian immigrant physicians increased from 4 per cent in 2000 to 8.4 per cent in 2008, with a net increase from 357 in 2013 to 644 in 2016 – a figure which represents around half of all foreign-born physicians (Finnish Medical Association 2016). They are over-represented in public health centres and emergency duty compared to their native-born peers (Aalto *et al.* 2014). Generally, they live in metropolitan Southern Finland and in eastern cities bordering Russia. Habti (2021) found that they create extensive co-national local and transnational social ties in both countries but that they experience difficulties in building close social relationships with local natives. Finland has been rated the happiest country in the world for the seventh consecutive time by the UN Happiness Report, leading in indexes of quality of life, effective government, trust in institutions, social support, generosity, low-income inequality, safety and personal freedom (Helliwell, Layard, Sachs, De Neve, Aknin and Wang 2024). While these characteristics could drive migration intention

from Russia, the question persists as to whether Russian physicians could enjoy these characteristic resources to improve their quality of life.

Data and method

This study is part of a research project that explores questions on the career mobility of Russian immigrant physicians in Finland to capture their lived experiences, including their subjective life satisfaction in the domains of work and family. This article presents the results from semi-structured interviews with 26 Russian immigrant physicians carried out in Finland between 2014 and 2015. Most of the participants were sampled based on an official list of 365 registered practicing physicians retrieved from the Finnish Medical Association (2014). After informing the interviewees of our research objectives, a request for participation and a letter of consent concerning ethical conduct were sent to them to be signed and returned. Initially, 32 responses were received but only 22 agreed to participate. The sample also included participants recruited through snowballing, whereby the first group members managed to introduce new participants. The recruitment of participants was done post migration, irrespective of the drivers of migration or the interviewees' socio-demographic characteristics. The sample emigrated to Finland in their early or mid-career stages between the late 1980s and the 2000s, comprising 22 women – only 2 without children – and 4 male participants. This sample reflects the profile of graduated physicians in Russia with an over-representation of women (n=272) to men (n=93). During the interviewing, they were aged between 28 and 60 years old, with more than half over 40 years old (n=17). On average, they lived in Finland for more than 15 years and worked for around 14 years. Their length of residence ranged between 8 and 35 years, providing diverse migration trajectories and individual experiences. The majority held dual citizenship or had migrated as Finnish ethnic repatriates with a Russian background. Several were married to Finnish citizens and had children. The geographical locations of the participants were diverse, ranging from big cities to peripheral towns (see Table 1 in the Annex).

The interview guide was constructed to prompt the participants to narrate what characterised their overall satisfaction with life or their 'quality of life' in Finland as a continued appreciation of the various life domains. The purpose was to portray their subjective evaluations rather than to examine their individual differences in their migration pathways and experiences – or the ways in which socio-demographic markers influenced their subjective life satisfaction. The questions within semi-structured interviews had an open nature and concerned subjective states in key life domains; they were designed to avoid performativity and social desirability bias in answers by participants. Important concepts and umbrella terms stirred the participants to share the meaning of questions, concepts and dimensions of life satisfaction. The study used thematic content analysis, involving manual coding of the data and identifying emergent themes. The coding was carried out both within and across the transcripts to best reflect the characteristics of the participants' narratives and common themes. The interviews lasted between 1.5 and 2 hours; they were carried out mostly on Skype, while others were conducted by phone, with a few face to face, according to the participants' availability. The language used was selected according to the participants' preference – either Finnish or Russian. The interviews were audio-recorded with their consent and transcribed *verbatim* from Russian or Finnish to English. The quotes cited here were selected based on strong features of and patterns identified in the data. The quotes were edited to protect participants' confidentiality and anonymity (names, specialisations and locations).

Moving beyond the overly used quantitative paradigm that systematically neglected and downplayed a qualitative approach (Thin 2018: 1–2), such a qualitative approach and interpretative analysis portray immigrants' life satisfaction not as a 'quantifiable essence, but as a diverse, fluid and elusive set of feelings and evaluations'. A qualitative approach allows an understanding of participants' evaluations of their lived experiences and provides an added-value contribution to research on subjective life satisfaction in synthesising

important empirical lessons. Interview narratives disclosing the participants' thoughts, feelings and meanings are at the core of that construction process. This necessitates the codification of which standards count as a socially constructed 'quality of life'. Thus, a qualitative approach allows the reconstruction of narrated reality, construction and explanations of consistent satisfaction with their life circumstances. The participants' subjective evaluations are linked to and contextualised into their life stories and are subject to interactive and situational variation, often showing heterogeneity on how they weigh up their satisfaction in work and family domains. Analysis of their evaluations is grounded on key resources identified in migratory experiences. Two levels of analysis were mobilised in tandem: an analysis of perceptions that provided diverse narrative accounts and tapped into the different questions to which the participants reacted and the evaluation of the societal conditions which they considered in their narratives. The individual characteristics of each participant were expected to influence life evaluations and yield individual differences but would not affect the empirical direction of the analysis. The mutual constitution between these analytic levels unveils their self-interpretations in biographies, including the strategies, practices and structures governing their migratory careers. In an empirical analysis, the themes are not interpreted as separate but rather as interrelated aspects of general patterns.

Constructing life satisfaction in *migratory careers*

Analysis of participants' biographic narratives on their subjective evaluations of life satisfaction revealed their views on an ensemble of identified self-defined resources nurturing life satisfaction within their diverse and distinct *migratory careers*. Overall, the perceived gains in the chances for a highly satisfying life mostly derive from the Finnish 'liveable environment' and life chances and individual 'life abilities', sustained by significant structural–societal and personal–relational resources.

The role of structural–societal resources

It is acknowledged that job satisfaction comprises different characteristics of work activities. Many late-career participants' life evaluations in their narratives show that they often compare their work–life experiences and conditions in Finland to previous ones in Russia as a reference point. They recall important resources of an ideal work environment that were missing in Russia, during the difficult macro-conditions and uncertainties of the 1990s onwards – namely work conditions, remunerations and the organisational environment (see Davidova *et al.* 2009). Many years since the 1990s, late-career specialist Marina, aged 59, who migrated to Finland in 1993 and witnessed such conditions in Russia, describes the Finnish supportive work environment and opportunities for career progression and concluded: 'Salaries here are much higher than Russia (…). I'm happy to go to work and come back home from work daily'. For early-career participants like Larisa, a specialist aged 36 who migrated after graduation in 2010, when reflecting on her reasons for migration, referred to the quality of and free medical residency for specialist trainees compared to Russia. She is satisfied with her first years' work experience, attributing it to a favourable income and supportive work environment. The presence of necessary infrastructures and resources and efficient organisational culture of institutions eventually make the working life of physicians productive and satisfying:

> *I moved to Finland to have a new experience and probably also for economic reasons; I had my own expectations and dreams that I could realise. After I started work in Finland, I liked the Finnish work environment and the attitude which physicians in Finland have towards their colleagues.*

For many participants, regardless of their career stages, the conditions of ongoing professional training and available resources, the organisational culture and the approaches to treatment in Russia differed from the Finnish ones. The Finnish work environment, with its medical resources, has a positive impact on the provision of healthcare as well as on physicians' mental wellbeing – and hence job satisfaction. Several participants reported that job satisfaction meant a good infrastructure, working environment and income, despite mentioning the pressure of long queues of patients and long working hours in primary care. Moreover, they reported satisfaction with their work conditions in connection with those of their private lives. As found earlier, low remuneration, poor living and working conditions and the profession's low prestige in Russia were push factors motivating many Russian physicians to migrate with aspirations for better work–life prospects.

Immigrants are satisfied with life in countries that provide high-quality public goods and welcoming social settings (Hendriks and Bartram 2016; Kogan *et al.* 2018). Effective social welfare policies promote resources that allow families to have a good quality of life and to strengthen their ties. The efficient functioning of institutions contributes to a rewarding social environment in the work–life balance when the state provides social services and learning infrastructures – such as a free and quality career-oriented education system – for professionals to perform their activities (Szücs *et al*. 2011). Natalia, a mid-career specialist, aged 46, who migrated in 1994, is satisfied with her salary and working life. She felt proud about experiencing 'good' training programmes which she believed enabled her professional advancement: 'I'm very proud that I can do so much. I think I could manage in quite a few places with a Finnish education. It's good that I had opportunities to practice'. Likewise, Tatjana, a late-career GP aged 55, explained how rich the Finnish health-education system was in learning and practice, developing her competences and ultimately making her satisfied with her work:

> *Young physicians certainly have received a quality education. When they start, they have the possibility to work in different clinics and benefit from vast learning opportunities. It raises the quality of a doctor's work experience.*

However, as a specialist, she referred to the daily challenge of 'full-time work with long queues of patients', as several other participants indicated. Overall, job satisfaction would naturally be reflected in intrinsic competency and performance, as one of its important psychological components.

Finland has embedded the flat working model and flexible working hours as it suits its culture of flat organisations – autonomy and trust and a low hierarchy between management and staff (Laarni, Miiluniemi, Nykänen, Schembri and Richer 2014). Such flexible organisational structures and working patterns aim to promote interprofessional communication and engagement, which are associated with increased productivity and performance. Most participants felt satisfied with these conditions, providing examples of those specific work-related resources which were feeding their job satisfaction. For example, ongoing opportunities for specialised training were believed to develop the physicians' individual abilities in their career mobility. The participants' narratives revealed their smoothly promoted social and professional status in their current work–family life situations. Thus, the flexible model clearly facilitated their accomplished navigation of their work and family lives, which was evidence of their satisfaction. To illustrate, Elena, a mid-career specialist aged 39, who migrated in 2008 and had been working for 7 years, mentioned that her career progression in Finland promoted her social and professional status after her accreditation: 'My social status certainly improved, because my salary is higher. My professional position changed because I am now a specialised doctor'. Often, the narratives disclose that the advantages of social status are coupled with the gain of high salaries. Take Vladimir, a late-career specialist aged 53, who migrated from Russia in 1990 after graduation; he reminded us of the difficulties that physicians would have encountered in advancing their professional skills and competences and achieving career progression in Russia, leading to a dissatisfying work–family life balance:

> *It is unlikely that, in the Russia of the 1990s and 2000s, I would have reached similar professional development milestones as I have now (...). Regarding family life, the living standard we have would be difficult to achieve in Russia.*

After 25 years of experience in Finland, Vladimir showed his satisfaction with working life, his Finnish work–life balance and the receiving country's healthcare system. Furthermore, Inga, a late-career specialist aged 55 and a repatriate Finn who migrated in 1998, explained how important it was to her to work and to be self-reliant in Finland as an immigrant physician. Indeed, she perceived her satisfaction in her gradually rising social and professional status over the years:

> *It is important for me that I am self-sufficient, that I came from another country, and I am working here... That is why the professional status I acquired after my accreditation and my extensive work experience are very important to me. I'm very satisfied with my situation.*

Considering these three participants' social and professional positioning, their narratives imply that they enjoy an elevated social and symbolic status going beyond mere pecuniary rewards in the Finnish context, hence their perceived upward social mobility and positive life evaluations (Hadjar and Samuel 2015). Their relative social and professional statuses matter in terms of life satisfaction with incomes and jobs. They felt better off when they compared their conditions to those of physicians in Russia. However, an early perceived life satisfaction may not continue to be evident over the years for all participants once they assimilate into Finnish lifestyle with its professional and socio-economic status and compare it with those of their Finnish colleagues (Hendriks *et al.* 2018).

The Finnish flexible work model appears to improve the participants' satisfaction with their family-friendly work environment. Family-welfare support provides resources which help dual-income spouses, who are both parents and workers, to cope with life pressures such as stress, overwork and intense child caregiving. While trying to balance family and work duties, parents often experience time pressures in childcare and an emotional engagement with their young children (Diener and Diener-McGavran 2008). The Finnish system provides convenient arrangements for working spouses. Child welfare package is highly valued which includes day-care, education, financial support and dual parental leave. In this regard, Julia, a specialist trainee aged 31, who migrated in 2009, expressed her satisfaction with family welfare support by linking the conception of welfare resources, pressures of work and career aspirations, especially for a young mother with a child during her first years of immigration and a busy accreditation process:

> *Social welfare seems secure and promising. I'm not a citizen yet but I get social support and healthcare and other things if needed. It's good for kids and I have that impression from my work. (...). As a family, we feel very happy; there are more possibilities for children because kindergartens are high-quality; my child feels good there.*

Additionally, after living in Finland for 12 years, Anatoli, an early-career specialist aged 35, considers safety and social security to be major attractive qualities of life in Finland. He believes his work environment, opportunities for professional development and work–family life balance schemes create ideal conditions for building and shouldering family responsibilities:

I have nice working environment and an interesting job I get paid for. I have some perspective at this stage to take on family responsibilities, because I have gained professional experience. Now, I can achieve my goals and dreams.

Migration can be seen as a turning-point that requires highly skilled immigrants to restart building stability in their lives. In a new social and work environment, a job that provides fair remuneration, skill utilisation and opportunities for professional growth is not only a source of job satisfaction but a prerequisite for a perceived right to build and lead a stable family life. Having achieved a certain level of comfort in their working life, the participants are likely to invest more time and effort in family responsibilities. These positive perceptions from their life-stories about experiences of the work–life interface are compared to their apparently less-favourable past experiences in Russia. For example, Irina, an early-career GP aged 36, who migrated in 2004, married and had a child, recounted her experience with pregnancy and delivery in Finland to exemplify the quality of the healthcare service and how one can combine work and family duties in Finland compared to Russia: 'Compared to Finland, combining professional and family duties would be 10 times more difficult in Russia'. Previous studies observed tensions between family demands and professional tasks among highly skilled immigrant women in Finland (Habti 2014a). This latter study found that the participants managed to varying degrees to successfully build a work–family balance manifested in their upward occupational and social mobility and new family configurations, in line with findings from other studies on highly skilled immigrants in Finland and Sweden (Habti 2021; Ivana 2020).

Being able to trust others in one's living circle – people, the workplace and public authorities – has been much associated with life satisfaction among immigrants. The participants generally held positive perceptions about Finnish public institutions as resources and public goods that could bring high life satisfaction to individuals and families. As they explained, their life satisfaction originated partially from the trust they had in institutions. This perceived trust in government and public institutions – among the top performers worldwide – is consistent with most surveys of the Finnish general population. Moreover, citizens' trust in institutions when the latter fulfil their promises contributes to a feeling of certainty and security and, consequently, increases life satisfaction. Finns' trust in and satisfaction with many valourised life domains, including welfare institutions and services, education, healthcare, social equality and social security, is among the flagships continuously ranking Finland as the 'happiest country in the world' (Helliwell *et al.* 2024). Therefore, we may ask whether institutional trust contributes to immigrants' overall life satisfaction compared to that of local natives (Arpino and de Valk 2018; Kogan *et al.* 2018). The participants' accounts often linked the advantages of public institutions' services and the organisational structure of the workplace with trust and satisfaction. For example, early-career specialist Anatoli described the Finnish health system as 'high quality' and trusts it with confidence: 'I trust it as a physician and a patient (…). I can compare it to Russia where healthcare doesn't work well, though the legislation is quite like the Finnish'. Based on her professional experience, Ljudmila follows the same line: 'I'm happy about the ways in which the Finnish health system treats pain and organises follow-up treatment (…). I never heard of such a social security system in Russia'. As argued above, the Finnish social welfare model successfully liaises with labour-market institutions and employment regulations to promote social and job security. Following the above-narrated views of participants, it positively influences the work–family balance and, accordingly, personal life satisfaction. Hence, welfare packages and family-friendly regulations arguably enhance professional productivity and satisfaction in family life.

The role of relational–personal resources

Hired for their specialised qualifications, Russian immigrant physicians may experience initial challenges other than the recognition of their credentials during the accreditation process after migration (Klein 2016). They may also experience a lack of recognition of their knowledge, competencies and accumulated experience at an interprofessional level. Honneth (2010) observed that work is a field of a worker's quest for self-realisation while its recognition is linked with the structure of work. In this respect, the participants do not necessarily expect to gain immediate recognition from colleagues and supervisors in their activities, which are already proven in professional *savoir-faire* and practices. However, meaningful recognition is an important precondition for respect and self-realisation and, consequently, a source of psychological wellbeing (Ormel *et al.* 1999). Workers need self-esteem and respect in work environment, without which they may develop feeling of insecurity, unworthiness and unwantedness. The participants' occupational entitlements and resources in work environment potentially generate 'intrinsic' job satisfaction grounded in the characteristics of professional activities – that is, positive interprofessional relationships that produce support, cooperation, respect and recognition, as studies have shown (Judge and Klinger 2008; Wang and Jing 2018).

Some participants, such as Tania, a young GP aged 33 who had been working in Finland for 8 years, benefited from supportive relationships with their supervisors and colleagues; as social conditions for a fulfilling working life, which increased her sense of respect and recognition and consequently job satisfaction: 'Career progress is reflected in my social status, satisfaction with my work and life in the fact that I learn and develop. I feel my work as a professional is recognised by colleagues and patients'. When she feels valued and recognised for her professionalism and contribution to health-service provision, she gains respect from her colleagues and patients. As such, the ability to contribute to the common good also means a contribution to one's wellbeing and *vice versa*. Likewise, young Larisa recalled and acknowledged the cherishing respect and recognition which had enriched her interpersonal engagement and performance. Such motivational conditions were significant affective resources which embodied her satisfaction with the work environment: 'I like the Finnish work environment and attitudes which physicians have towards their colleagues; it is very important that a young newly arrived physician is respected and supported by colleagues'. Indeed, respect and recognition are conceived as fundamental social and institutional conditions for a fulfilling working life and, thus, a sense of job satisfaction when positive interprofessional relationships flourish. Following Ormel *et al.* (1999), status is a major instrumental means to one's ultimate human goal of social and psychological wellbeing, often through intrinsic interpersonal relations characterised by resources such as trust, recognition, respect, support, self-esteem and efficacy (also Sirgy 2021).

Social support as an interpersonal resource plays a significant role in the physicians' interprofessional relationships in work environment, as it influences their job satisfaction. Like several participants, Ljudmila, a mid-career GP aged 47, migrated in 2011 and had worked for only 4 years in Finland. She expressed her satisfaction with the positive interprofessional cooperation and interpersonal relationships: 'I feel very satisfied at work and work goes well (…). Teamwork cooperation goes well and we have good relations'. In a recent study, Russian immigrant physicians in Finland acknowledged their work organisation, non-hierarchical relations and teamwork as positive outcomes of their migratory careers (Habti 2021). The quality of the relationship with their supervisors and colleagues are considered pivotal in their job satisfaction and socio-psychological wellbeing at work.

Other participants' narratives revealed that they experienced intrinsic job satisfaction instilled by the sense of belonging to and shared professional identity and engagement with the workplace community. Such qualities generate social trust developing from trustworthy interprofessional relations and mutual professional support. For example, Ksenia, a mid-career specialist aged 42, who migrated as ethnic repatriate in 2000 and

who, after 15 years of work experience, described her positive experience in this way: 'I work independently as a physician and make my own decisions. I always had the support from my senior physician (manager) and now it's me who is a senior physician'. Owing to the effects of support and trust, she succeeded in functioning fully as an individuated autonomous physician, thus gaining the opportunity to reach her professional self-realisation. Moreover, shared professional values and a commitment to medical practice result in a rewarding job satisfaction and job performance, as Inga recalled: 'To see patients recovered is more important to me than salary. The personnel and the environment are important because we spend most of our life at work. You feel accepted by and comfortable with the personnel'. Accordingly, participants generally perceive themselves as mutually related. Similarly, the work domain characterised by such intrinsic resources from interprofessional relationships increases their job satisfaction. However, as found elsewhere (Habti 2021), they may encounter challenges in their adaptation to a socio-cultural life due to the 'cumulative disadvantage' of establishing enduring social bonds with local Finns outside work, partly because they lost friends in Russia, as featured in Inga's narrative.

Social relationships are important for immigrants' life satisfaction (Arpino and de Valk 2018), especially family contact and closeness and friendships. Family relations influence members' life satisfaction across the life span as they generate support and parental backing. Social support provided by family members and extended relatives contributes to a greater satisfaction in their work and family lives, especially in assuming family responsibilities when both spouses are professionally active. Besides, the Finnish social welfare system provides people with social benefits, assistance and information. The narratives generally indicate these valuable resources when participants navigate the opportunities and challenges in the work–family life balance. They referred to the family support package they could have. Slava, a mid-career specialist aged 40, migrated in 2007 and carried out specialisation training of 3 years, which took up much of her time. She attributed her satisfaction with rewarding relationships to the assistance with childcare from her spouse and other relatives on whom she could count. Recounting the importance of her husband's support in the period of early childcare, she underlined the positive aspects of supportive marital ties: 'Family responsibilities affected my life when I had a young child to take care of. My husband was at the stage of his degree accreditation, but we shared childcare, and our parents helped us so much'. Most participants showed satisfaction with their fulfilling family and marital relationships, while building resilience to working life pressure. As argued earlier, married couples who provide emotional and material support to each other are healthier and live longer but such outcomes strongly depend on their physical and emotional proximity (Man *et al.* 2023; Thomas *et al.* 2017).

Slava's positive account was contrasted with those of 4 divorced women in their mid- and late-career stages. These participants had experienced complicated family histories with children involved, competing time pressures, increasing caregiving obligations and low emotional wellbeing, and had struggled to balance work and family life. Such family situations had strong implications for these women's emotional state, lifestyle choices and life satisfaction. Indeed, highly skilled immigrant women may experience a disproportional burden when it comes to the division of household labour and care responsibilities (Habti 2014a; Kofman and Raghuram 2005; Man *et al.* 2023). When asked about quality of life, Elena, a divorced mother raising a 3-year-old child alone, admitted experiencing difficulties with long working hours and loneliness due to absence of support from relatives who live in Russia. Such a situation apparently exacerbated her emotional wellbeing. For her,

> *Quality of life is social wellbeing – that is, having social interaction and contacts. Quality of life is lacking when one is lonely and a single parent. (…) I haven't had time for hobbies for 3 years because of taking care of my child.*

Elena conceives social wellbeing as social wellness based on supportive and nurturing relationships and interaction with people in difficult times. Her case resembles that of a few other female participants who associated quality of life with fulfilling family bonds, friendships and social life. For example, Irina's social life was devoid of meaningful social relations, closeness and support from family in Russia, which seemed to propel her into loneliness: 'The greatest disadvantage is probably loneliness in the social domain (…); social wellbeing is a positive experience of inward peace and wellbeing, which is important to me'. For Elena and Irina, the difficulties in their social life appear to negatively affect their work–life balance and quality of life. With their demanding work schedules and the absence of relatives and friends, local and transnational social ties could have provided them with much-needed social and emotional support. Such relational social features directly influence social and psychological wellbeing. These women's 'migratory careers' exemplify the possible disadvantageous life events and opportunities experienced in migration across work–family lives, questioning the assumptions of 'privileged" and well-off" highly skilled immigrants (Habti 2014a; Man *et al.* 2023).

Human security and safety are social and economic resources of a good quality of life for immigrants. In their narratives, they would refer to personal, financial, social, political and/or physical security and, importantly, a subjective conception of a safer life (Purkayastha 2018; Sirgy 2021). The participants, mainly women with children and spouses/partners, were highly satisfied with their personal and family stability, safety and economic security. For example, Ksenia, who stressed the importance of family stability and admitted that such concerns, together with economic factors, were sufficient reasons to migrate from Russia: 'The most important reasons to leave Russia are economic situation and instability'. The participants generally regarded Finland as an extremely safe and secure place for a family to live in, as Ksenia added: 'Finland is a good country to live in, peaceful and safe for children; it has probably always been like that (…). Safety is one of the reasons to migrate, especially if you have children'. While the participants understood security and safety in different ways, they generally linked them to quality of life which is influenced by sense of social cohesiveness and stability, and generosity in community life (see World Happiness Report 2024, Helliwell *et al.* 2024).

Empirical studies generally support a positive relationship between security and safety and life satisfaction across work and family domains. For instance, Williams *et al.* (2015) observed that neighbourhood safety in Canada can be an important factor in improving an immigrant's quality of life and related the perception of safety to environmental and interpersonal factors such as social justice, family harmony, mutual respect and the feeling that one could get help from one's neighbours when needed. Our finding aligns with such a tenet, which suggests such an outcome may be universal to different immigrant categories. Moreover, the migration of Russian physicians is partly driven by a quest for socio-economic and personal security and family-life stability (Habti 2019; Klein 2016). Galina, an early-career GP aged 33, who migrated in 2008 and is still a trainee-physician and mother of 3 children, compares her life experience in Russia with her current one, recollecting the difficulties of achieving a rewarding work–life balance with full-time child-caring: 'There is no guarantee of a safe and secure life with 3 children in Russia. There is no opportunity to build a career, fulfil professional duties and work honestly while caring for kids'. In relation to human development, conceiving security and safety in Finland at personal, relational, societal and socio-economic levels appears to differ considerably from the ability to attain similar life chances in Russia. The participants subjectively evaluated their life as more secure and safer and with positive outcomes in the meaning of life, freedom and a cherished future life for themselves and their families.

Conclusions

This study examined life satisfaction among Russian immigrant physicians in both work and family domains. We sought to analyse and understand whether they are satisfied with their lives in Finland and to identify major resources which they perceived to influence life satisfaction in their work and family life. The qualitative analysis of their experiences and interpretation of their life satisfaction from biographic narratives provided a holistic portrait of the opportunities and challenges they perceived to have contributed or undermined it. Although their migration journeys, preferences and conceptions of quality of life are typically individualised, they report converging positive evaluations of life satisfaction. During the meaning-making process, their personalised characteristics evolved, redefining their priorities and life conditions. They have the resources and opportunities to fulfil their aspirations for career and social mobility and, thus, job satisfaction, while maintaining a thriving or less challenging family life. We found a connection between their migration aspirations-capabilities and wellbeing-induced opportunities (de Haas 2021). Exploring their 'migratory careers' (Martiniello and Rea 2014) allowed us to move beyond their individual aspirations-capabilities driving the migration process and to construct their life satisfaction in the intertwining work–family life balance. The narratives confirm their heterogeneous migratory careers during which they often anchored life evaluations retrospectively with reference to Russia and prospectively to life ahead in Finland.

The main themes identified in the analysis emphasise that: (i) the positive returns from Finnish social welfare resources promote satisfaction in both work and family lives; (ii) consequently, they are satisfied with their working-life environment; and (iii) in turn, this increases their satisfaction with family life in terms of family relations and work–family arrangements which benefit shared parental duties, childcare and personal wellbeing. Analysis shows that participants conceive that their experienced and interpreted life satisfaction derives from and is constructed in the context of intertwining societal–structural and personal–relational resources which they perceive to promote fulfilling work and family life. It is the personal meanings of and cherished values and norms in such resources that increase or decrease their life satisfaction, although those meanings, values and norms naturally vary among immigrants. The main findings suggest that they are overall satisfied with their two life domains. Beyond the classical resources of income, organisational structures and occupational mobility in the work domain, most participants found that the values and norms of work environment, like family-friendly work conditions and interprofessional relationships, significantly influenced their job satisfaction – namely, the esteem, recognition, support and trust they cherish for their social status, which eventually nurtures self-realisation. Regarding the family domain, their life satisfaction is mainly associated with resources which nurture family relationships – i.e., social and personal life security and family stability.

The findings confirm that thriving is considered to be a process of social change, meeting their aspirations-capabilities for a better life abroad. Reciprocal relations between work and family domains have now been acknowledged by existing research. Additionally, the standards of what counts as good work–family life conditions are socially constructed and they can reflect the immigrants' pecuniary satisfaction; however, such qualitative personality traits as career success, self-realisation, self-esteem, recognition and respect also count towards what material conditions can mean to them. For Russian physicians, life satisfaction obviously seems to be driven by the quest for professional self-achievement and social promotion of family life in a safe and secure country. Also, what is needed for a 'good life' is also gendered and varies across migratory careers of men and women; hence, how women and men construct their life satisfaction differently was not analysed. However, one important finding featured among a few single mothers who experienced low emotional wellbeing due to loneliness and a lack of enjoyment in their social life. Nevertheless, their narratives signal that their migratory careers represent a route to empowerment at both personal and professional levels. Thus,

an important contribution in this study is the cross-disciplinary theoretical underpinnings of the 'migratory career', which encapsulates the migration process and multidimensional analyses. Such an approach allows us to connect broader empirical analysis of immigrants' evaluative life satisfaction from sociological and psychological theories and to capture the identified resources as they unfold from the narratives.

We need to consider certain limitations. First, our qualitative analysis does not allow us to claim causality and generalisability. Based on this sample and qualitative method, we cannot stipulate the amount of variability of subjective life satisfaction which accounted for migration, neither can we assume that all Russian physicians are satisfied with their migratory experiences. Second, the findings capture the dynamics of the migratory careers from Russia to Finland. Hence, it might be expected that their pre-migration situations can translate into different individual motivations and perceptions, while Finland provides its own specific context for immigrant physicians. Moreover, differences are expected to be found in other studies in countries with different structural–societal resources to the Nordic countries. Last, because they represent a potential knowledge and developmental asset and resource for receiving countries, understanding the facets of subjective life satisfaction would add value to the diversity in scholarship and would help human resource managers to benefit more effectively from their *savoir-faire* and work experiences.

Acknowledgments

I would like to thank the second author for her contribution to the article's theoretical background. We would like to thank the 2 anonymous reviewers and the editor for their constructive comments. Last, grateful acknowledgment goes to Kone Foundation for funding this study as part of Driss Habti's postdoctoral research project.

Conflict of interest statement

No conflict of interest was reported by the authors.

ORCID IDs

Driss Habti https://orcid.org/0000-0002-1751-0870
Nina Szczygiel https://orcid.org/0000-0001-5026-1629

References

Aalto A.M., Heponiemi T., Keskimäki I., Kuusio H.M., Hietapakka L., Lämsä R., Sinervo T., Elovainio M. (2014). Employment, Psycho-Social Work Environment and Well-Being among Migrant and Native Physicians in Finnish Health Care. *European Journal of Public Health* 24(3): 445–451.

Amit K. (2010). Determinants of Life Satisfaction among Immigrants from Western Countries and from the FSU in Israel. *Social Indicators Research* 96(3): 515–534.

Arpino B., de Valk H. (2018). Comparing Life Satisfaction of Immigrants and Natives across Europe: The Role of Social Contacts. *Social Indicators Research* 137(3): 1163–1184.

Babar Z., Ewers M., Khatab N. (2019). Im/Mobile Highly Skilled Migrants in Qatar. *Journal of Ethnic and Migration Studies* 45(9): 1553–1570.

Bartram D. (2015). Migration and Quality of Life in the Global Context, in: W.L. Glatzer, V. Camfield, V. Moller, M. Rojas (eds), *Global Handbook of Quality of Life*, pp. 491–503. Dordrecht: Springer.

Bolzani D., Crivellaro F., Grimaldi R. (2021). Highly Skilled, Yet Invisible. The Potential of Migrant Women with a STEMM Background in Italy between Intersectional Barriers and Resources. *Gender, Work & Organization* 28(6): 2132–2157.

Davidova N., Manning N., Palosuo H., Koivusalo M. (2009). Social Policy and the Health Crisis in the New Russia, in: N. Manning, N. Tikhonova (eds), *Health and Health Care in the New Russia*, pp. 1–24. Farnham: Ashgate.

De Haas H. (2021). A Theory of Migration: The Aspirations–Capabilities Framework. *Comparative Migration Studies* 9(8).

Denzin N. (1989). *Interpretive Biography*. London: Sage.

Diener M.L., Diener-McGavran M.B. (2008). What Makes People Happy? A Developmental Approach to the Literature on Family Relationships and Well-Being, in: M. Eid, R.J. Larsen (eds), *The Science of Subjective Well-Being*, pp. 347–375. New York: Guilford Publications.

Dyer S., Xu Y., Sinha P. (2018). Migration: A Means to Create Work–Life Balance? *Journal of Management & Organisation* 24(2): 279–294.

Favell A., Feldblum M., Smith M.P. (2007). The Human Face of Global Mobility: A Research Agenda. *Society* 44: 15–25.

Finnish Medical Association (2016). *Physicians in Finland: Statistics on Physicians and the Health Care System*. Helsinki: Finnish Medical Association. http://www.laakariliitto.fi/site/assets/files/5223/ll16_tilasto2016_net1_170114.pdf (accessed 08 April 2024).

Gerber R., Ravazzini L. (2022). Life Satisfaction among Skilled Transnational Families before and during the COVID-19 Outbreak. *Population, Space and Place* 28(6): e2557.

Habti D. (2012). Patterns and Effects of Mobility: Conceiving Linearity and Circularity, in: D. Habti, *Highly Skilled Mobility and Migration from MENA Region to Finland: A Socio-Analytical Approach*, pp. 58–97. Joensuu: University of Eastern Finland, PhD thesis.

Habti D. (2014a). Spatialities of Work and Home in Dual-Career Context of Highly Skilled Arab Women in Finland. *Journal of Finnish Studies* 17(1/2): 92–125.

Habti D. (2014b). The Religious Aspects of Diasporic Experience of Muslims in Europe within the Crisis of Multiculturalism. *Policy Futures in Education* 12(1): 149–162.

Habti D. (2018). Mapping Drivers of Arab Highly Skilled Self-Initiated Expatriation to Finland: Personal-Professional Pendulum, in: D. Habti, M. Elo (eds), *Global Mobility of Highly Skilled People: Multidisciplinary Perspectives on Self-Initiated Expatriation*, pp. 107–145. Cham: Springer.

Habti D. (2019). What's Driving Migrant Russian Physicians to Stay Permanently in Finland? A Life-Course Approach. *Journal of Finnish Studies* 22(1/2): 85–118.

Habti D. (2021). Differentiated Embedding and Social Relationships among Russian Migrant Physicians in Finland: A Narrative Socio-Analysis. *Social Inclusion* 9(4): 266–277.

Hadjar A., Samuel R. (2015). Does Upward Social Mobility Increase Life Satisfaction? A Longitudinal Analysis Using British and Swiss Panel Data. *Research in Social Stratification and Mobility* 39: 48–58.

Hajro A., Stahl G.K., Clegg C.C., Lazarova M.B. (2019). Acculturation, Coping, and Integration Success of International Skilled Migrants: An Integrative Review and Multilevel Framework. *Human Resource Management Journal* 29(3): 328–352.

Han X., Mortimer J.T. (2023). Dynamic Work Trajectories and their Interplay with Family over the Life Course. *Frontiers in Sociology* 8: 1096109.

Helliwell J.F., Layard R., Sachs J., de Neve J-E., Aknin L.B., Wang S. (eds) (2024). *World Happiness Report 2024*. University of Oxford: Wellbeing Research Centre. https://worldhappiness.report/ed/2024/ (accessed 10 April 2024).

Hendriks M., Bartram D. (2016). Macro-Conditions and Immigrants' Happiness: Is Moving to a Wealthy Country All that Matters? *Social Science Research* 56: 90–107.

Hendriks M., Burger J.M., Ray J., Esipova N. (2018). Do International Migrants Increase Their Happiness and that of Their Families by Migrating? In: J.F. Helliwell, R. Layard, J. Sachs (eds), *World Happiness Report 2018*, pp. 45–61. Oxford: University of Oxford, Wellbeing Research Centre.

Heponiemi T., Hietapakka L., Kaihlanen A., Aalto A-M. (2019). The Turnover Intentions to Leave the Country of Foreign-Born Physicians in Finland: A Cross-Sectional Questionnaire Study. *BMC Health Services Research* 19(1): 624.

Hombrados-Mendieta I., Millan-Franco M., Gomez-Jacinto L., Gonzalez-Castro F., Martos-Mendez M., Garcia-Cid A. (2019). Positive Influences of Social Support on Sense of Community, Life Satisfaction and the Health of Immigrants in Spain. *Frontiers in Psychology* 10: Article 2555.

Honneth A. (2010). Work and Recognition: A Redefinition, in: H.C. Schmidt am Bush, C.F. Zurn (eds), *The Philosophy of Recognition: Historical and Contemporary Perspectives*, pp. 223–240. Plymouth: Lexington Books.

Ivana G.-I. (2020). Work–Life Balance for Transnational Skilled Workers in Sweden. *Work Organization, Labour and Globalisation* 14(2): 64–80.

Judge T.A., Klinger R. (2008). Job Satisfaction: Subjective Well-Being at Work, in: M. Eid, R. Larsen (eds), *The Science of Subjective Well-Being: A Tribute to Ed Diener*, pp. 393–413. New York: Guilford Press.

Klein J. (2016). *Transferring Professional Knowledge and Skills: The Case of Central and Eastern European Migrant Physicians in German Hospitals*. Leverkusen: Budrich-Unipress.

Kofman E., Raghuram P. (2005). Gender and Skilled Migrants: Into and Beyond the Workplace. *Geoforum* 36(2): 149–154.

Kogan I., Shen J., Siegert M. (2018). What Makes a Satisfied Immigrant? Host-Country Characteristics and Immigrants' Life Satisfaction in Eighteen European Countries. *Journal of Happiness Studies* 19: 1783–1809.

Koskela K. (2019). Intersecting Experiences: Class, Gender, Ethnicity and Race in the Lives of Highly Skilled Migrants in Finland. *Nordic Journal of Migration Research* 9(3): 311–328.

Kushnirovich N., Sherman A. (2018). Dimensions of Life Satisfaction: Immigrant and Ethnic Minorities. *International Migration* 56(3): 127–141.

Laarni J., Miiluniemi T., Nykänen E., Schembri I., Richer E. (2014). *Case Study Summary Report: New Ways of Working*. Espoo: VTT Technical Research Centre of Finland.

Lahti M. (2013). Cultural Identity in Everyday Interactions at Work: Highly Skilled Female Russian Professionals in Finland. *Nordic Journal of Working Life Studies* 3(4): 21–43.

Man P.K., Gan R.Y., Fong E. (2023). A Gendered Analysis of Family, Work, Social Spheres and Life Satisfaction: The Case of Highly Educated Migrants in Hong Kong. *Asian and Pacific Migration Journal* 32(1): 129–151.

Martiniello M., Rea A. (2014). 'The Concept of Migratory Careers': Elements for a New Theoretical Perspective of Contemporary Human Mobility. *Current Sociology* 62(7): 1079–1096.

Mihăilă A. (2019). Non-Economic Factors Influencing Highly Skilled Migration. *Review of Economic Studies and Research Virgil Madgearu* 12(1): 27–53.

Mozetič K. (2018). Being Highly Skilled and a Refugee: Self-Perceptions of Non-European Physicians in Sweden. *Refugee Survey Quarterly* 37(2): 231–251.

Neira I., Bruna F., Portela M., Garcia-Aracil A. (2018). Individual Well-Being, Geographical Heterogeneity, and Social Capital. *Journal of Happiness Studies* 19(4): 1067–1090.

Ormel J., Lindenberg S., Steverink N., Verbrugge L.M. (1999). Subjective Well-Being and Social Production Functions. *Social Indicators Research* 46: 61–90

Otrachshenko V., Popova O. (2014). Life (Dis)Satisfaction and the Intention to Migrate: Evidence from Central and Eastern Europe. *The Journal of Socio-Economics* 48: 40–49.

Pavot W., Diener E. (2008). The Satisfaction with Life Scale and the Emerging Construct of Life Satisfaction. *The Journal of Positive Psychology* 3(2): 137–152.

Popovich L., Potapchik E., Shishkin S., Richardson E., Vacroux A., Mathivet B. (2011). Russian Federation: Health System Review. *Health Systems in Transition* 13(7): 1–190.

Potinkara N. (2023). Constructing Ethnic and National Belonging: Ingrian Finnishness in a Museum Exhibition. *Journal of Finnish Studies* 26(1): 78–110.

Purkayastha B. (2018). Migration, Migrants, and Human Security. *Current Sociological Monograph* 66(2): 167–191.

Rodríguez-Pose A., von Berlepsch V. (2014). Social Capital and Individual Happiness in Europe. *Journal of Happiness Studies* 15(2): 357–386.

Ryan L. (2011). Migrants' Social Networks and Weak Ties: Accessing Resources and Constructing Relationships Post-Migration. *The Sociological Review* 59(4): 707–724.

Safi M. (2010). Immigrants' Life Satisfaction in Europe: Between Assimilation and Discrimination. *European Sociological Review* 26(2): 159–176.

Sirgy M.J. (2021). *The Psychology of Quality of Life*. Dordrecht: Kluwer Academic Publishers.

Statistics Finland (2023). *Official Statistics of Finland: Population and Society 2022*. https://www.stat.fi/en/publication/cl8n2djzw3b360cvz35t3up2r (accessed 2 April 2024).

Szücs S., Drobnic S., den Dulk L., Verwiebe R. (2011). Quality of Life and Satisfaction with the Work–Life Balance, in: M. Bäck-Wiklund, T. van der Lippe, L. den Dulk, A. Doorne-Huiskes (eds), *Quality of Life and Work in Europe*, pp. 95–117. London: Palgrave Macmillan.

Thin N. (2018). Qualitative Approaches to Culture and Well-Being, in: E. Diener, S. Oishi, L. Tay (eds), *Handbook of Well-Being*, pp. 1–20. Salt Lake City, UT: DEF Publishers.

Thomas P.A., Liu H., Umberson D. (2017). Family Relationships and Well-Being. *Innovation in Aging* 1(3): igx025.

Veenhoven R. (2012). Happiness, also Known as 'Life Satisfaction' and 'Subjective Well-Being', in: K.C. Land, A.C. Michalos, M.J. Sirgy (eds), *Handbook of Social Indicators and Quality of Life Research*, pp. 63–77. Dordrecht: Springer.

Walton-Roberts M., Runnels V., Rajan S.I., Sood A., Nair S., Thomas P., Packer C., MacKenzie A., Tomblin-Murphy G., Labonté R., Bourgeault I.L. (2017). Causes, Consequences, and Policy Responses to the Migration of Health Workers: Key Findings from India. *Human Resource for Health* 15: Article 28.

Wang Z., Jing X. (2018). Job Satisfaction among Immigrant Workers: A Review of Determinants. *Social Indicators Research* 139(1): 381–401.

Warr P.B. (1999). Well-Being and the Workplace, in: D. Kahneman, E. Diener, N. Schwarz (eds), *Well-Being: The Foundations of Hedonic Psychology*, pp. 392–412. New York: Russell Sage Foundation.

Webb D., Willis-Herrera E. (2012). Introduction, in: D. Webb, E. Willis-Herrera (eds), *Subjective Wellbeing and Security*, pp. 1–10. Dordrecht: Springer.

Williams A.M., Kitchen P., Randall J., Muhajarine N., Newbold B., Gallina M., Wilson K. (2015). Immigrants' Perceptions of Quality of Life in Three Second- or Third-Tier Canadian Cities. *The Canadian Geographer* 59(4): 489–503.

How to cite this article: Habti D., Szczygiel N. (2024). 'For a Secure and Stable Life': Constructing Life Satisfaction in the 'Migratory Careers' of Russian Immigrant Physicians in Finland. *Central and Eastern European Migration Review* 13(1): 189–210.

Central and Eastern European Migration Review
Received: 17 June 2023, Accepted: 7 March 2024
Published online: 4 April 2024
Vol. 13, No. 1, 2024, pp. 211–226
doi: 10.54667/ceemr.2024.04

'Many Benefit from You Being Undocumented Here': The Everyday Capabilities of Undocumented Immigrants in Moscow

Maija Kalm-Akubardia*

This critical ethnographic study was conducted among 15 immigrants originally from Caucasian and Central Asian countries, each with more than 10 years of undocumented residence in Moscow. It focuses on the everyday experiences of undocumented immigrants in a non-Western context, illustrating how informal networks, alongside official migration policies, contribute to and exploit unequal capabilities. The study emphasises the thresholds of emotions, affiliation and control over a person's environment, demonstrating power asymmetries between individuals. Given the participants' prolonged undocumented stay in Moscow, the findings demonstrate how the socio-legal context of an undocumented status facilitates informal exploitation alongside institutional operating models, aligning with migration policies in practice.

Keywords: undocumented immigrants, capability approach, critical ethnography, Moscow, immigration control, informal

* University of Helsinki, Finland. Address for correspondence: maija.kalm-akubardia@helsinki.fi.

Introduction

With approximately 12 million foreigners, Russia is one of the top 5 migrant-receiving countries worldwide (McAuliffe and Triandafyllidou 2021). The labour input of foreigners corresponds to approximately 6.4 per cent of Russia's gross domestic product, with an estimated 60 per cent of these immigrants being undocumented (Aleshkovskii, Grebenyuk, Kravets and Maksimova 2019). The definition of an undocumented immigrant is not fixed. Here, it refers to judicial administrative factors under which a very heterogeneous group of people live and work without permission. The politicisation of undocumented migration in Russia does find parallels with democratic Western policies but differs in its coercive practices that grant limited legal impunity to some of the immigrants only through corruption and bribery (Schenk 2021). As well as state authorities, undocumented immigrants engage in everyday interactions with private individuals in informal connections and networks; hence, before comparing Russia with Western countries purely from the perspective of immigration legislation and its practices, we should pay attention also to the experiences of actual capabilities realised outside the institutions (Urinboyev and Eraliev 2022). Thus, instead of focusing on the processes of formal immigration legislation and its implementation with official records or on the corruption within government agencies, my study highlights the role of the less-discussed informal connections, meaning interaction and operations between private individuals and their networks, affecting the realisation of undocumented immigrants' overall capabilities. For these above-mentioned reasons my study asks how undocumented immigrants experience the significance of informal capabilities in their everyday lives. The capabilities of those who are ostensibly left out of society are seen as a central part of state economics and policy.

Immigration is a complex process across time that, due to temporary admissions and legal categorisation, increases the risk of irregularities (Farcy and Smit 2020). Besides geographical issues, temporal aspects, such as the duration of the stay, define the immigrant's status and represent a political question (Boyce 2020). My empirical analysis draws on ethnographic research among long-term undocumented immigrants with years of experience of having no formal contact with state institutions. The ramifications of the administrative status of being undocumented have left the capabilities to be organised and controlled by informal connections. The longer duration of the undocumented stay of the study participants, with the experiences of cyclical changes affecting the realisation of informal capabilities, underlines the expediency of the practice and the connection between formal and informal operation models, serving the same policy goals. Madeleine Reeves (2019) elaborates on the experiences of labour migrants in Moscow working within grey zones, where bureaucracy produces illegality and preconditions for an increase in informal payments to street bureaucrats. In her study, the queue of immigrants claiming for place and voice is a social space requiring acceptance and practices of engagement from the immigrants (Reeves 2019). In my study, the temporal aspect is visible in cyclical changes, noticeable in the experiences of available capabilities to the study participants, through which the informal becomes an integrated part of the formal operating model, steering the capabilities of those ostensibly left out of society. Although the literature has cultivated the synthesis of the grey economy, bureaucracy, and xenophobic elements as part of formal migration policies, the centrality of private actors taking part in steering the overall capabilities of undocumented immigrants is a less touched-on topic.

Moscow has been a growing research field regarding changing immigration policies and the racialisation of nationalities since the collapse of the multinational Soviet Union (see Roman 2002). The practices from 'ours' to 'others', referring to the representations of different habitants of the former Soviet republics, have had a cyclical nature in migration policies (Abashin 2016). The right-wing populistic mindset shows Russia as an international conservative power striving to protect its national interests and preserve its traditions with Christian heritage (Diesen 2020); however, research has highlighted well-developed informal practices in

governance (e.g. Ledeneva 2011, 2013) with the state's capacity-building through corruption and the strategic exploitation of migrant labour (Schenk 2021). The socio-legal side of an undocumented status reveals various dependencies and challenges to human rights across borders – studies have already underlined the working mechanisms of Russian immigration legislation not as its own separate phenomenon but with several commonalities with other great powers receiving immigrants (Kubal 2016, 2020). The survival method of labour migrants is to navigate opportunities through informal channels as an integral part of their migration practices (Urinboyev 2020). The shadow economy, with its unsustainable practices, fragments institutional trust and prevents the positive impact that immigration would bring to society (Heusala and Aitamurto 2016).

The socio-legal position of an undocumented immigrant is an actual issue within the discussion of migration development, pursuing maximum financial profit while promoting engagement in international human-rights treaties. The longer duration of undocumented residence – with periodically varying amounts of capability available – gives a temporal aspect to the hypothesis of an existing synthesis between the state migration policy and experienced restrictions on capabilities negotiated informally. As such, this study focuses on the viewpoint of long-term undocumented immigrants, expressing how the numerous informal practices between private actors play their own role within immigration policies and their implementation. Focused on the end results, the experienced capabilities allow for the evaluation of the overall situation in practice without interfering with the question of differences within legal commitments and their interpretation and implementation. This also enables us to take into account the complexity of factors that affect the different settings when observing the actual prerequisites for capabilities (Nussbaum 2011). From the 10 overlapping capabilities, distinguished by Nussbaum (2000), this study pays special attention to thresholds of *emotions*, *affiliation* and *control over one's environment*, all manifesting the power asymmetries between the people, affecting their overall capabilities within society. In this paper, I begin by discussing previous studies on undocumented immigration in Russia. I then continue by presenting the theoretical framework and the research field before proceeding to the empirical analysis and conclusions.

Undocumented migration in Russia

Undocumented immigration is shown to be beneficial to many and not only because of the flow of money across borders; it is also in Russia's versatile interest to benefit from the cheap migrant labour force (e.g. Light 2016; Schenk 2018). The migrant agent is often the focus of critical discussion while the shadow economy and the legal provisions are less often the focus – or the target of action (Heusala 2017). Previous research on labour migration has approached the question from the complex socio-legal viewpoint of exploitation and state capacity-building within migration policies, where obtaining permits is made difficult and corruption – together with the grey economy – causes challenges when it comes to the interpretation of legality (e.g. Kubal 2019, 2020; Schenk 2021). Border studies concerning former Soviet Union citizens and labour migrants from Central Asia, navigating their opportunities within informal networks (Urinboyev 2020), together with their rights to family and health care (Kashnitsky and Demintseva 2015), speak of the combination of informal strategies, strict bordering and the othering of immigrants through racialisation into individuals without rights and needs (Agadjanian, Menjívar and Zotova 2017; Nikiforova and Brednikova 2018).

The migration policies and statuses of different citizens have varied greatly since the collapse of the Soviet Union (e.g. Chudinovskikh and Denisenko 2017) and some immigrants have been living – undocumented – in the country ever since. The government has used immigrants in policymaking on national security, drawing on the rhetoric of existential threats to justify authoritarian actions to restrict individuals' capabilities, in which the Roma, Central Asians and Caucasians have been portrayed as 'undesirables', criminals and threats to the national economy (Bacon, Renz and Cooper 2006). Simultaneously, for geopolitical interests, a certain status

and Russian citizenship has been granted to people from unrecognised states in the former Soviet Union, such as Abkahzia and South Ossetia (Molodikova 2017).

The expressions 'Russia for Russians' and, later, 'Russia for the Russians, Moscow for the Muscovites', existed before the Soviet Union; however, starting from Putin's presidency, racial prejudice has been mixed with anti-terrorist ideologies to justify the violence related to wars in nearby areas and in Moscow, with the state-governed media playing an important role in manufacturing ethnic prejudice (Avrutin 2022). The myth of the guilty 'other' emerges, framing immigrants as threats to the Russian people (Schenk 2018). Since 2012, the Russian State Duma has passed a string of repressive laws aimed at non-governmental organisations and individuals, including those supporting the rights of minorities.

Russia is one of the world's most ethno-culturally diverse countries, where racial discrimination affects a considerable proportion of its citizens. The state has faced the challenge of how to unify, satisfy and control nationalistic ideologies in the crossfire of different interest groups. Populism has been used to strengthen President Putin's authority in the multi-ethnic state by emphasising the role of citizenship (e.g. Burrett 2020). A heterogeneous group under the single heading of 'illegal immigrants' has been created and the largest nationalist organisations have focused on people without citizenship (Kolstø and Blakkisrud 2016). The concept, however, has been used in a targeted manner. At the turn of the millennium, with Russia at war with Chechnya and afterwards with Georgia, Caucasian appearance or family name alone was enough for a person to be referred to as illegal. The limited social stigmatisation of nearly 50,000 individuals – half of the world's skinheads – as extreme-right and racist gang members narrows down the possibilities for peaceful coexistence (e.g. Kuznetsova and Round 2019; Zakharov 2015). The increase in racist crimes in the first decade of the twenty-first century made Russia one of the deadliest places in the world for minorities (Arnold 2016).

Since the undocumented immigrant needs to negotiate his/her capability to work and live informally between private individuals, the quantity and quality of these relations either enables or restricts these capabilities (e.g. Urinboyev 2021). The exploitation of social, legal, political and economic possibilities is a sign of overall societal dysfunction when equality, values of belonging and limitations on membership in society are relevant to everybody (Anderson 2015). The experiences of long-term undocumented immigrants, living through several political periods in the same country, offer a new perspective on the role of ordinary citizens and their attitudes towards immigrants as an important factor shaping the amount and quality of capabilities.

The capabilities of undocumented immigrants

Nussbaum's capability approach (2011) examines the well-being and flourishing of society through the actual capabilities of its individuals. The capability approach is mostly concerned with the end results, the outcomes equally present for the people. By concentrating on the end results, the methods by which to pursue the goal and the forms of implementation can differ (Nussbaum 2000, 2011). The condition for a dignified life nonetheless includes 10 minimum thresholds for capability, and the failure of our societies to provide and protect these thresholds increases inequality (Nussbaum 2011). According to Nussbaum (2000), the thresholds are (1) life, (2) bodily health, (3) bodily integrity, (4) senses, imagination and thought, (5) emotions, (6) practical reasons, (7) affiliation, (8) other species, (9) play and (10) control over one's environment, including political and material environments. Nussbaum's framework is rooted in a normative philosophical concept of a fulfilling life and has faced criticism for presupposing that disadvantaged individuals lack the capacity for critical self-reflection regarding their own well-being (Arun 2022). Building on these critiques, I aim to underscore the capacity for the critical assessment and intentional adjustment of preferences within the confines of structural limitations, particularly among the long-term undocumented immigrants participating in my research.

Applying for asylum in Russia is most often pointless (Bloch 2022). Passports are issued when they serve the interests of the Russian state (Richey 2018). The changing policies of the Russian citizenship regime are not clearly articulated for the Russian population or for immigrants and amendments to the citizenship law have been adopted quickly without public discussion (Molodikova 2017). The ambiguity of the law and its administration are used by the state as a mode of governance, with formal and informal activities working simultaneously towards surprisingly coherent sets of goals (Schenk 2021). The line between formal and informal activities is sometimes hard to indicate, especially when the activities co-exist to such an extent that it is unclear whether a payment required is a fine or a bribe (Schenk 2021). Concurrently the average citizen does not necessarily confront these challenges but witnesses the message of active immigration control through state media (Schenk 2021).

Following the capability approach, no one should be treated as an agent to execute another's life plan but as a source of agency with his/her own life to live, deserving the support for capabilities in reciprocity with others (Nussbaum 2011). Nussbaum refers to people as citizens, concluding that every human being in the world is entitled to capabilities and that it is the duty of humanity to realise entitlements for everyone to enable them to rise above the minimum concerning capabilities (Nussbaum 2000, 2006). Regarding undocumented immigrants in Moscow, none of the capability thresholds are protected by the state. The informal networks and bribes, however, offer restricted and unstable capabilities. Questions regarding life, bodily health and integrity are necessities for survival and, as such, require the undocumented immigrant's capability to negotiate and to cooperate with citizens. The minimum capability thresholds regarding *emotions, affiliation* and *control over one's environment* are thus crucial for my study, since they embody the complex challenges of an undocumented immigrant in interaction with his or her surroundings (Nussbaum 2000).

From the chosen thresholds, emotions refer to the ability to have attachments to things and people, to love but also to grieve and to feel gratitude and justified anger, so that one's emotional development is not ruined by the overwhelming fear of and anxiety caused by traumatic events, abuse or neglect (Nussbaum 2000). In my study of traumatic events, I refer not only to the situations leading to migration but also to the level of perceived discrimination during the person's undocumented life, leading to symptoms of psychological distress (cf. Peña-Sullivan 2020). This distress has been found in studies to be especially severe for undocumented immigrants, raising significant clinical, political and societal questions (Herroudi, Knuppel and Blavier 2024). The threshold of *affiliation* means that a person can live with and for others, recognising and showing concerns for others by engaging in various forms of social interaction, having compassion for others and the capability for both justice and friendship, self-respect and equality, while society protects institutions that constitute and nourish such forms of affiliation (Nussbaum 2000). As a minimum, this affiliation means protection against discrimination based on race, sex, sexual orientation, religion, caste, ethnicity or national origin and the ability to work and exercise practical reasoning in mutual recognition of other workers (Nussbaum 2000). Of all the thresholds, *control over one's environment* protects one's ability to participate effectively in policies that govern one's life, having the right to political participation and a free voice. This threshold is also material, meaning that, as part of a person's control over his or her environment, he or she needs to be able to hold property, not just formally but in terms of real opportunity; because of this, the right to seek employment on an equal basis with others and to have freedom from unwarranted search and seizure is crucial (Nussbaum 2000).

Implementation of the study

Methods

I completed this multi-sited ethnographic research, including 2 week-long fieldwork periods in Moscow, in December 2017 and January 2020. Beyond the actual face-to-face fieldwork in Moscow, an online field was established through messengers, video calls and emails from December 2017 to February 2022. Altogether, my research data consisted of an observation diary from each field trip to Moscow and 150 pages of 15 ethnographic interviews, together with the recordings, phone calls, voice and chat messages received between and after the face-to-face fieldwork in Moscow. During the trips to Moscow, I stayed in 2 of the same apartments as the study participants (the first one was that of an acquaintance, which made it easier for me to reach the other participants). Further, 5 other undocumented immigrants lived close by – some of whom were elderly – and they came to meet me for the first time; we thus had our discussions separately in a small kitchen. I also visited 3 other study participants. Regarding the remaining participants, I talked with them in a car while following their daily activities. Russian was used as the common language in all communication.

The outbreak of the Covid-19 pandemic and the spread of the war in Ukraine prevented me from carrying out more extensive fieldwork in Moscow. Although online methods such as digital ethnographies or 'netnographies' are not a new phenomenon for the social sciences, some scholars, such as Marnie Howlett (2022), have underlined the need to see how they reshape our overall understanding of the fieldwork we undertake and the data which we collect. For my study, changes to the original research plan were made with limited alternatives. Fortunately, I had the opportunity to get to know all the participants face to face before the borders were closed. The online field functioned naturally, since the study participants had already maintained relations with their relatives in numerous locations for years. In the end, the physical and internet-based fields in my study formed a single, continuous entity, parallel and integrated with one another (Falzon 2016). The online field embodied the shared reality, perhaps in some cases even more realistically than it would have with my physical presence. With elderly people, however, the face-to-face discussion in kitchens and cars was irreplaceable and the online field would not have functioned without the trust created in our meetings in the very beginning. Overall, the Covid-19 pandemic and, later, the escalation of the war in Ukraine in 2022, only added content to my analysis, verifying the previous and recurring societal problems and political changes experienced by my study participants, which brought difficulties to the streets and to informal capabilities, first and foremost to already vulnerable minority groups.

Critical ethnography provided the philosophical foundation for my fieldwork, analysis and writing process (Gobo 2008). Critical ethnography is ethnography viewed through the lens of justice (Hagues 2021). The choices made between the concepts of 'illegal immigrants' and 'undocumented immigrants' have been approached as an indicator of researchers' political positions (e.g. Callister, Galbraith and Carlile 2022). In my study, I hope to underline that the distinction between legal and illegal, formal and informal is far from straightforward, even more in countries where over-regulation and poor law enforcement occur side by side with informal operating models (Ledeneva 2011; Reeves 2013). Thus, I aim to disrupt the *status quo* and bring light to the obscure operations of power (Madison 2020). By listening to and analysing the more constrained, out-of-reach experiences of long-term undocumented immigrants, I wish to expand our overall understanding of the factors significant to those who are undocumented regarding their capabilities within the society. The study participants prompted me to proceed further with my findings, seeking the root cause of experienced inequity and those standing to benefit from it. 'Let me tell you how things really work around here' was a phrase repeated to me numerous times, usually continuing with a description of the existing power structures and their economic drivers. I am especially grateful for such comments because they reminded me of why I embarked

on this research project in the first place: to bring better awareness of the state policies and implementations affecting those above and beyond their mandate.

The critical 'ethical radar' has been prioritised at all stages of my research project due to the unpredictable political, legal and social agendas concerning migration and its governance (Zapata-Barrero and Yalaz 2020). For this reason, my study did not identify the participants in any detail. Participation was voluntary and based on mutual trust. In the implementation, collection, processing and management of the research material, I have followed the guidelines on good scientific practice set by the Finnish National Board on Research Integrity (TENK), which replicate international guidelines and provide advice for the overall ethical assessment (Keiski, Hämäläinen, Karhunen, Löfström, Näreaho, Varantola, Spoof, Tarkiainen, Kaila and Aittasalo 2023). As stated by TENK (2019), the principles for research provide clear guidance on ethical issues and function as a part of the self-regulation system for human sciences, where the final responsibility always rests with the researcher, including foresight when it comes to any form of potential harm that could be caused to the people participating in the research. An ethical pre-assessment by an ethics committee is carried out at the request of a researcher only in limited cases – e.g. when participants are minors without parental consent or when the research intervenes the physical integrity of research participants (TENK 2019). The informed consent for my research was requested from each of the participants after I described the topic and the goal of my research, the expected duration and the points related to the use of the research material. The possibility for participants to withdraw was given – and my contacts in the field stayed on to this day without withdrawing. The research material is not available to other participants in the study and has not been nor will not be shared after the research is completed. The recordings were deleted after their transcription, as were all the messages, shared via WhatsApp and Telegram, after all the data essential for the further analysis of some material was pseudonymised and saved on a university's password-protected, secure disk. The participants themselves were responsible for deleting the shared information from their own devices. For security reasons, the fieldwork ended in the spring 2022 due to the Russian full-scale invasion of Ukraine.

Participants

I found the first study participants through personal contacts and then through snowball sampling. The 15 participants came from Caucasia and Central Asia – both women and men, aged 23–70 years old, mostly with higher education (some with interrupted studies due to migration). The participants had lived undocumented for more than 10 years in Moscow. A few of them had spent their entire childhood and youth undocumented. The middle-aged ones had fled war and hunger and went to Moscow as young adults with Soviet passports. One had been a refugee for 20 years but had been in Moscow for only a week at the time of our first meeting. The participants worked mostly in the food industry. Approximately half of the participants, after living for up to 15 years without documents in Moscow, now possessed Russian citizenship. The rest of the participants were still, after more than 20 years, without residence permits. The experiences of life without – and later with – citizenship were valuable for understanding the experiences of immigrants as a whole and the special vulnerability of undocumented immigrants.

The capabilities of emotions and affiliation

Martha Nussbaum's capability approach underlines the need for a dignified human life in which one has the capability to pursue one's own conception of the good in cooperation with others (Nussbaum 2000). Most of the participants had arrived in Moscow as refugees during the turbulent years following the collapse of the Soviet Union – having lost homes, family members, income and homeland with a shared future. Some of the

Caucasian participants had tried to return home and rebuild everything again only to see it get burned down once more. As described by one participant, 'What we had, our home, it's destroyed and no longer exists, when we get old and die, we can dream of getting buried there, that's all there is left'. Moscow was chosen as a destination because, for most of the participants, it was the only direction open and, as the previous capital of the Soviet Union, offered possibilities for income as well as special medical care that was no longer available in their recently destroyed home towns. The first years in Moscow, right after the collapse of the Soviet Union, at the beginning of the 1990s, were pictured as scary, with hunger, fear and little hope of returning home. The capability of emotions (Nussbaum 2000) could not be met, as the participants did not have the opportunity to demonstrate justified anger – and the feeling of overwhelming fear and anxiety was still present. During the first years of undocumented stay, however, the situation was said to be difficult for everyone and the immigration policies were not foremost in the locals' minds, which facilitated the establishment of those informal networks which were essential for everyone's capabilities and survival.

After the first turbulent years of the 1990s, the issue of citizenship became more real and started to influence the means of negotiating with locals for housing, children's schooling and health care. The overall dissatisfaction of people, mixed with the competition over livelihood and right-wing populism in state-governed media, slowly and steadily grew into more systematic forms of racism, as experienced by the participants. The bitter experiences of hate that any foreign-looking individual could face grew steadily following the wars in Chechnya. The thresholds for emotions and for affiliation (Nussbaum 2000) could not be met when the media presented an image of Caucasians as criminals, terrorists and drug dealers, in favour of Vladimir Putin's strong administration, normalising the demonisation of immigrants (e.g. Russell 2005). Society did not protect institutions constituting and nourishing forms of affiliation and immigrants were not protected against discrimination based on race, ethnicity or national origin (Nussbaum 2000). Long-term friendships with the locals were suddenly caught in the crossfire of the population's growing dissatisfaction with living conditions and right-wing populist discourses in the public media. The situation of rising nationalism was later repeated with the Russo–Georgian War in 2008, as told by one of the participants, originally from Abkhazia, Georgia. I followed him to the market where he helped his senior (undocumented) relatives sell homemade gravies. As the seniors got out of the car, he explained how some of the older people still remembered the prior friendship between Georgians and Russians. Public rhetoric, however, changed with the collapse of the Soviet Union and the rise of an openly nationalistic agenda.

> *It is impossible to try to convince those who do not understand anything else. We wait for 5, 6 or maybe 10 years. Only when they negotiate again with our* [Georgian] *politicians with results more pleasing to them will they also on TV declare that we are brothers. It is not possible for us to try to convince* [anyone of] *something else in between.*

As he stated, 'It's all politics more than a citizenship issue. It was said on TV that Georgians were bad. The youth believed [it]. Younger citizens without personal ties and positive memories were easily manipulated by the racist message'. Later in the evening, the same participant told me that, during the years of international conflict, he was afraid to walk in the streets. This was not only because of the fear of officials but because the amount of money which he was expected to pay to locals who had become suddenly interested in an additional income at the expense of 'those illegal immigrants' was getting so high that many in his situation needed to steal to provide it. One of the younger undocumented immigrants stated, 'Without documents, you need to be ready to pay for everything and [money] to everyone for your existence'. Besides collecting bribes, expectations for transactional favours increased, while threats and blackmailing rose and lists of foreign school children were given to immigration officers to trigger the deportation of entire families. One of the

undocumented adult participants, who lived his whole childhood as undocumented, was suddenly accused by his local friend of 'stealing income from the Russian people'. As he stated, 'On any given day, you needed to be ready to be blamed for something wrong in the lives of the majority population, even though you were just existing with the restricted capabilities available to you'.

According to the participants, most of the population over the age of 35 still believed that national television was the most reliable source of information. This makes it challenging for ordinary citizens to turn to alternative media sources (Gehlbach, Lokot and Shirikov 2022). A participant interested in Russian language and communication stated that she had actively followed local news and estimated that less than 1 per cent of the content discussed issues related to immigration without political biases. Another middle-aged participant summed up her experiences of and feelings about the issue: 'Without documents, you are a zero here'. The state-aligned media created a picture of 'illegals' without social rights, providing justification for anyone to blame and benefit from the subordinate status of the undocumented immigrants, creating a direct capability failure for an affiliation on a societal level. The capability to have concerns for other human beings, to have compassion and to seek justice and friendship is based on the idea of reciprocity, the failure of which affects not only the capabilities of the undocumented immigrants but the whole society.

None of my study participants had contact with organisations which could have raised the issue of immigration policies in public debate. Only one of my participants, originally from Abkhazia, remembered an agency that had taken care of refugees' affairs by handing out refugee cards. Ironically, those cards served only as evidence of an 'illegal stay' for the police. Participants experienced the stigma of being illegal in their increased need to work with worsened working conditions, to pay more penalties and bribes not only to state officials but to anyone in need of extra income in institutions and on the streets, as well as within the private sector. Based on my observations, no serious attempt has been made to change the system, whereas the number of immigrants has increased (e.g. Schenk 2018).

Talking with study participants helped me to understand the temporal difference between being undocumented during the chaotic years following the collapse of the Soviet Union in the 1990s and today, when formal and less-formal practices, such as service fees, work opportunities, fines and bribes, are more systematically managed both at a higher level and online. After all these years, most of the participants felt that they already knew how and where to get things done. They had also become more transparent, in contradiction with new minority groups. Thus, after two decades of undocumented stay, constant fear was not as present as before. The years of fear, however, left the participants sick, in their own words. As repeated to me on many occasions, 'Only such a person, who has lived here like me, for years, being afraid of everyone and everything and having nothing, will know what it has done to me'. The fifth capability – emotions – is crucial if individuals are to feel attached to their surroundings (Nussbaum 2000). This means the capability to have feelings such as love and grief, gratitude and longing as well as justified anger, where one's emotional development is not overwhelmed by fear and anxiety, traumatic events of abuse or neglect (Nussbaum 2000). As my fieldwork has shown, the pre-migration events had caused physical suffering and states of fear and the stress concerning migrants' undocumented status only further exacerbated the traumatic experiences.

The subordinate status of undocumented immigrants makes them an easy target for anyone wishing to benefit from social inequity. The state, besides failing to protect the capability of undocumented immigrants to govern their own lives, further narrows down their capabilities by representing different immigrant groups as, more or less, 'others' (Abashin 2016), simultaneously approving the exploitation on the streets. The bribery practices are well-developed and partly standardised, bringing bread to the table not only to officials but to private individuals as well. One young participant narrated how the authorities, failing to find a way to benefit themselves, look away or 'laugh out loud' when the undocumented report thefts. Unpaid wages, an accident at work or any other ill treatment leading to disability or death belonged to the same category, where filing a report

only worsened the situation of the undocumented individuals and families. One of the participants, who currently works in a cafeteria further from the city centre, had previously worked in managerial positions, albeit undocumented. She stated, 'I can deal with the racists – a few of whom had even collaborated with me – but I cannot change the fact that, when I am found to be a competitor or threat, anyone can expose me and my family to the officials'. I heard the same frustration in the voice of a young adult participant whose family had moved to Moscow from Central Asia when he was just a child. He took a deep breath, explaining how the nationalists were not the biggest concern to him but rather the governance and state-aligned media, keeping people repeatedly reluctant to face ever-growing inequality. These experiences show how the threshold of affiliation (Nussbaum 2000), being able to work and exercise practical reasoning in mutual recognition with others, is not only left unrealised but is also used against undocumented immigrants. Besides support from friends and relatives, their entire survival was based on cyclically changing capabilities outsourced to informal networks without possibilities of appeal. The capability to attach to society is thus conditional and, first and foremost, is not protected from the whims of the markets and power politics (Nussbaum 2011).

As capability theory emphasises an individual's well-being in reciprocity, it would be misleading to comprehend capability failures as affecting only minorities. During the Covid-19 pandemic, 4 of the study participants became seriously ill. Participants noticed that people, regardless of their citizenship status, came to work visibly sick rather than risk a loss of income. Simultaneously, the national TV channels and newspapers showed the police deporting foreigners who were not complying with the quarantine requirements (e.g. *MBK-News* 2020; *The Insider* 2020). The attention shifted again from inadequate social security and healthcare to the 'others'. This represented an example of societal challenges, where public health measures were compromised in a bid to enhance state power (e.g. Lamberova and Sonin 2022). The second epidemic wave raised some public criticism. One of the participants had just spent more than 20 hours waiting for an ambulance for her (undocumented) grandmother. With a cold voice, she stated, 'In the face of this disease, we are all alone with our money and connections – documents or not, nobody cares, as long as you have money; that's just too obvious to everyone'.

The capability of political and material control

As experienced by the participants, the challenges of obtaining a residence permit and having the capability to act differed from the reality presented in public speeches. Residence and work-permit practices were burdensome, expensive and difficult to implement in practice and, as told by the participants, can also hinder the possibilities to live in Russia. The country's Refugee Law is not implemented properly and the state denies asylum to most refugees (e.g. Lyapina 2021). Simultaneously, while living with the participants, I witnessed how routinely an undocumented refugee – with just one phone call – obtained a low-paid job in grey markets as a cleaner, kitchen worker, construction worker or servant, a bit further out from the city centre, without the endless bureaucracy. The informal practices generated capabilities alongside the official policies that denied them. Moscow is an expensive city to live in, so those who work within this framework sleep on couches, just as one participant did, sharing her room with me during my field work and sending money to relatives back at home. Such a life is about working hard for your family's survival and being ready to lose it all at any given moment. Helping other family members, as stated by the participants, gave life a meaning, with very little freedom of choice and personal fulfilment.

In addition to immigrants from Caucasia and Central Asia – as refugees and/or undocumented work forces – the plight of immigrants from Ukraine and Belarus was striking. The East Slavic immigrants were creating increased wage competition in already low-paid occupational groups and some of the undocumented participants narrated how the newcomers had a negative effect on their position and salary. The participants

easily recognised the repetitive forms of exploitation and the reasons behind the selective immigration policy, affecting overall capabilities differently depending on the country of origin. As described by one of the participants, 'Many benefit from you being undocumented here'. These examples embody the repetition of simultaneous capability failures on multiple levels, as the ideas of reciprocity and affiliation are misused (Nussbaum 2000). From the perspective of control over one's environment, the participants have no possibilities to participate in policies to govern their own life or close environment, their employment is not realised on an equal basis with others and there is no protection from unwarranted search and seizure processes (Nussbaum 2000).

Regarding undocumented immigrants from one of the so-called Russian colonies – that is, former parts of the Soviet Union (Koplatadze 2019) – the individuals remain under the rule of Russian governance. Their choices are made with narrowed-down capabilities between limited options. According to the participants in this study, the state used them as hostages to practice political extortion. Some of the participants had originally tried to apply for refugee status but were told to accuse their home country of oppression and to apply for political asylum. They explained to me how they could not do this, since it was not the case and they wished to return home after the war. Therefore, they stayed undocumented in the country as they awaited peace, until the outbreak of new Russian hostilities with Georgia in 2008 and the growing number of street-level aggressions in Moscow, fed by the state media blaming 'illegal immigrants' for organised crime. This made any form of safe existence in the country impossible for undocumented immigrants. Simultaneously, Russian passports were distributed to people as the only option besides growing violence, oppression and deportation. One participant reflected on his dilemma of dreaming of returning home but being forced to choose between lost hopes and safety reasons.

> *We are redundant there now, too. Everything you and your family have had is destroyed. Your rights are trampled, no matter what you do; you are a second-class citizen there as well but also unemployed. There are no prospects for you or your children and you are lying to yourself, just to find some peace of mind, if you try to think any other way.*

The Russian state maintains a system of exploitation that serves its geopolitical interests and transborder nationalism, with direct presidential control of migration flows (e.g. Kuznetsova 2020). The well-advertised, forced deportations in the name of 'national security' had taken place repeatedly, both before and during elections and conflicts with neighbouring countries. As experienced by the participants, the grounds for the sudden deportations did not match the public reasoning of 'fight against illegal crime', as the unwarranted search and seizure happened mostly during the conflicts of interest between neighbouring countries.

'It's not the people, it's the politics' is a popular saying in Russia, one repeated to me often when the participants described the reality of the advantages which undocumented immigrants represent for the state and how it defines their human value. The desire to keep an undocumented immigrant in the country needs to be greater than the interest of deportation. To the study participants, the question of international politics concerned ownership in the distribution of funds and resources across the borders of former Soviet states. These negotiations were held far away from ordinary people, citizens or undocumented immigrants. From the perspective of the study participants, the interests behind politics were never about the country and its people. According to one of the participants, who has had Russian citizenship now for a few years after living as an undocumented immigrant, 'In politics only money matters, in Moscow at least, it's all about money, it is not about the people'. The study participants had been undocumented for years; thus, they had built their lives by considering the uncertainty of political interests and the potential consequences of such interests for their everyday lives. Undocumented immigrants do not have capabilities concerning control over their environment,

since they are manipulated in administrative procedures and on the streets, where the struggle for survival takes place.

In one of our kitchen discussions, a senior participant questioned the reason for my research: 'Why do you want to discuss these old matters. It is just politics; people are the same everywhere. I am already old. No one can change what happened to us. Someone needed this to be like this, and that's it'. Before I could answer, a middle-aged man answered, 'Friend, have you forgotten how we ran from the police, climbed up a tree, how they took our salary, [how] we returned home empty-handed? Do you think they stopped with us?' As a few of the participants mentioned, the same tactics were now being used to stigmatise and ease the exploitation of new immigrant groups on the streets: 'What they did to us they will do with the other newcomers. We will compete [to act in society] with a growing number of suffering people around us'.

Conclusions and discussion

The issues of immigration legislation, bureaucracy and the grey economy, together with widespread corruption as part of public activities affecting the possibilities of undocumented immigrants within society, have been discussed earlier (e.g. Kaushal 2019; Kubal 2019; Schenk 2013, 2018, 2021). Concentrating on the experiences of long-term undocumented immigrants in Moscow, my study examines how the everyday capabilities of undocumented immigrants are produced and realised through informal contacts, in cooperation with private individuals and networks. This cooperation is often transactional, conditional and susceptible to cyclical, political influence. The study concludes that the lack of citizenship and working permits are administrative factors enabling the exploitation of the undocumented immigrant not only by the representatives of institutional decision-making bodies but also by anyone outside the institutions. As such, this study confirms that the socio-legal context of the undocumented status enables informal exploitation side by side with the well-studied institutional operating models. This connection is manifested in years of experience of restricted capabilities concerning affiliation, emotions and control of one's environment in a synchronous, cyclical relation between formal and informal practices. The versatile forms of failure among society's members concerning affiliation and emotions, together with a lack of control over one's environment, are experienced by long-term undocumented immigrants as following and, in the end, serving the overall goals of formal immigration policy.

None of the capability thresholds (Nussbaum 2000) are supported by society in a trustworthy manner and they are all dependent on changing external factors, over which the undocumented immigrant has very little influence. The lack of attention to structural factors acts as a breeding ground for inequality and further exploitation, preventing the tackling of systematic social failures. Dealing with the issue of 'illegal immigrants' has become part of the public agenda, a problem for the nation to solve, while the social challenges and political conflicts between the country and its neighbouring countries keep bringing immigrants to Moscow, which benefits from the stock of cheap labour and the multidimensional dependence of neighbouring countries. Simultaneously, the ramifications of strict, expensive and discriminatory migration policies support the emergence and development of informal practices within and outside state agencies, offering minimum thresholds for capabilities with unequal and unstable terms – familiar to long-term undocumented immigrants. Rather than directing critique at the decision-making bodies responsible for the complex societal challenges, the criticism repeatedly hits those with restricted capabilities. The length of the undocumented stay, the fixed forms of bribery and the collapse of civil society, together with the silencing of the independent media, all underscore the expediently maintained oppression.

The question of reciprocity is essential when considering the thresholds for capabilities in a society with experiences of growing inequity. Martha Nussbaum (2000) states that no one should be treated as a commodity to serve economic or political needs, since each individual should be seen as a valuable part of society with

indivisible human dignity. In the case of undocumented immigrants, the official and unofficial operating models are, nevertheless, foremostly aimed at political and economic gains. According to my study participants, average citizens were viewed partly as a tool with which to justify and support the policies, brazenly trampling on human rights. The participants spoke in detail about the repetition and overall growth in the number of people being oppressed year by year, with the help of state-aligned media – experienced as a particularly frustrating pattern manifested on the institutional level and on the streets during international conflicts and elections. My study, however, relies on ethnographic observations and discussions conducted solely from the perspective of immigrant participants' experiences of capabilities; thus, the results reported in my study regarding the possible awareness and perspectives of others should be considered in the light of some limitations.

Following the expansion of war in Ukraine in 2022, Russia was excluded from the Council of Europe and is, overall, distancing itself from international human-rights norms and structures. Prior studies have raised extensive concerns regarding the political and economic cooperation of so-called Western countries with Russian state representatives. Simultaneously, as mentioned already, the politicisation of undocumented migration in Russia does find parallels with democratic Western policies (Schenk 2021). The realisation of capabilities is an obligation binding all societies, even if the methods of implementation differ. The capability approach has allowed the distinguishing of the institutional means from their outcomes and the experienced capabilities from the public declarations. The experiences of cyclical repetition and the development of informal models over the years show the expediency of the practice. As such, this study offers analytical tools with which to locate growing, discriminatory policies in different societies regardless of any regional forms of implementation.

Conflict of interest statement

No conflict of interest was reported by the author.

ORCID ID

Maija Kalm-Akubardia https://orcid.org/0000-0002-1114-6713

References

Abashin S. (2016). Migration Policies in Russia: Laws and Debates, in: A.-L. Heusala, K. Aitamurto (eds), *Migrant Workers in Russia. Global Challenges of the Shadow Economy in Societal Transformation*, pp. 26–44. London: Routledge.

Agadjanian V., Menjívar C., Zotova N. (2017). Legality, Racialization, and Immigrants' Experience of Ethnoracial Harassment in Russia. *Social Problems* 64(4): 558–576.

Aleshkovskii I.A., Grebenyuk A.A., Kravets V.A., Maksimova A.S. (2019). Foreign Migrants in the Russian Labor Market: The Estimate of Their Overall Number and Their Contribution to Russia's GDP. *Economic and Social Changes: Facts, Trends, Forecast* 12(6): 197–208.

Anderson B. (2015). *Us and Them? The Dangerous Politics of Immigration Control*. Oxford: Oxford University Press.

Arnold R. (2016). *Russian Nationalism and Ethnic Violence: Symbolic Violence, Lynching, Pogrom, and Massacre*. London: Routledge.

Arun M.O. (2022). Three Flaws in One Justification. A Critical Examination of Nussbaum's Reasoning Behind her List of Capabilities. *Istanbul: İlmi Etüdler Derneği* 12(2): 1–24.

Avrutin E.M. (2022). *Racism in Modern Russia: From the Romanovs to Putin*. London: Bloomsbury Publishing Plc.

Bloch A. (2022). Congolese Mothers, Affective Circuits and 'Acts of Citizenship' in Russia. *Citizenship Studies* 26(6): 852–867.

Bacon E., Renz E., Cooper J. (2006). *Securitizing Russia: The Domestic Politics of Vladimir Putin*. Manchester, New York: Manchester University Press.

Boyce G.A. (2020). Immigration, Policing, and the Politics of Time. *Geography Compass* 14(8): e12496.

Burrett T. (2020). Charting Putin's Shifting Populism in the Russian Media from 2000 to 2020. *Politics and Governance* 8(1): 193–205.

Callister A.H., Galbraith Q., Carlile A. (2022). Politics and Prejudice: Using the Term 'Undocumented Immigrant' over 'Illegal Immigrant'. *Journal of International Migration and Integration* 23(2): 753–773.

Chudinovskikh O., Denisenko M. (2017). *Russia: A Migration System with Soviet Roots*. Migration Policy Institute. https://www.migrationpolicy.org/article/russia-migration-system-soviet-roots (accessed 22 March 2024).

Diesen G. (2020). Russia as an International Conservative Power: The Rise of the Right-Wing Populists and Their Affinity Towards Russia. *Journal of Contemporary European Studies* 28(2): 182–196.

Falzon M.A. (ed.) (2016). *Multi-Sited Ethnography: Theory, Praxis and Locality in Contemporary Research*. Abingdon, New York: Routledge.

Farcy J.-B., Smit S. (2020). Status (Im)Mobility and the Legal Production of Irregularity: A Sociolegal Analysis of Temporary Migrants' Lived Experiences. *Social & Legal Studies* 29(5): 629–649.

Gehlbach S., Lokot T., Shirikov A. (2022). The Russian Media, in: S. Wengle (ed.), *Russian Politics Today: Stability and Fragility*, pp. 390–407. Cambridge: Cambridge University Press.

Gobo G. (2008). *Doing Ethnography*. London: Sage.

Hagues R. (2021). Conducting Critical Ethnography: Personal Reflections on the Role of the Researcher. *International Social Work* 64(3): 438–443.

Herroudi L., Knuppel I., Blavier A. (2024). Post-Migration Journey: Asylum, Trauma and Resilience, Different Trajectories – A Comparison of the Mental Health and Post-Migration Living Difficulties of Documented and Undocumented Migrants in Belgium. *International Journal of Social Psychiatry* 70(1): 201–208.

Heusala A.-L. (2017). Introduction: Russian Societal Transformation and Migrant Workers in the Shadow Economy, in: A.-L. Heusala, K. Aitamurto (eds), *Migrant Workers in Russia: Global Challenges of the Shadow Economy in Societal Transformation*, pp. 1–15. Abingdon: Routledge.

Heusala A.-L., Aitamurto K. (2016). Conclusions: Societal and Political Consequences of the Shadow Economy in Russia, in: A.-L. Heusala, K. Aitamurto (eds), *Migrant Workers in Russia: Global Challenges of the Shadow Economy in Societal Transformation*, pp. 156–160. Abingdon: Routledge.

Howlett M. (2022). Looking at the 'Field' through a Zoom Lens: Methodological Reflections on Conducting Online Research During a Global Pandemic. *Qualitative Research* 22(3): 387–402.

Kashnitsky D., Demintseva E. (2015). Undocumented Migrants Seeking Medical Care in Russia: Barriers and Informal Strategies. *The European Journal of Public Health* 25(suppl_3): ckv176.054.

Kaushal N. (2019). *Blaming Immigrants: Nationalism, and the Economics of Global Movement*. New York: Columbia University Press.

Keiski R., Hämäläinen K., Karhunen M., Löfström E., Näreaho S., Varantola K., Spoof S-K., Tarkiainen T., Kaila E., Aittasalo M. (eds) (2023). *Hyvä tieteellinen käytäntö ja sen loukkausepäilyjen käsitteleminen*

Suomessa. *Tutkimuseettisen neuvottelukunnan HTK-ohje 2023*. Tutkimuseettisen neuvottelukunnan julkaisuja; Vol. 2/2023.

Kolstø P., Blakkisrud H. (2016). *The New Russian Nationalism*. Edinburgh: Edinburgh University Press.

Koplatadze T. (2019). Theorising Russian Postcolonial Studies. *Postcolonial Studies* 22(4): 469–489.

Kubal A. (2016). Spiral Effect of the Law: Migrants' Experiences of the State Law in Russia – A Comparative Perspective. *International Journal of Law in Context* 12(4): 453–468.

Kubal A. (2019). *Immigration and Refugee Law in Russia*. Cambridge, New York: Cambridge University Press.

Kubal A. (2020). Can Statelessness Be Legally Productive? The Struggle for the Rights of Noncitizens in Russia. *Citizenship Studies* 24(2): 1–16.

Kuznetsova I. (2020). To Help 'Brotherly People'? Russian Policy Towards Ukrainian Refugees. *Europe–Asia Studies* 72(3): 505–527.

Kuznetsova I., Round J. (2019). Postcolonial Migrations in Russia: The Racism, Informality and Discrimination Nexus. *International Journal of Sociology and Social Policy* 39(1/2): 52–67.

Lamberova N., Sonin K. (2022). Information Manipulation and Repression: A Theory and Evidence from the COVID Response in Russia. *University of Chicago, Becker Friedman Institute for Economics Working Paper* (2022–101). https://bfi.uchicago.edu/wp-content/uploads/2023/07/BFI_WP_2022-101.pdf (accessed 19 March 2024).

Ledeneva A. (2011). Open Secrets and Knowing Smiles. *East European Politics and Societies* 25(4): 720–736.

Ledeneva A. (2013). *Can Russia Modernise? Sistema, Power Networks and Informal Governance*. Cambridge: Cambridge University Press.

Light M. (2016). *Fragile Migration Rights.* London: Routledge.

Lyapina A. (2021). Contemporary Refugee Policy in Russia in 2012–2021: Contradiction Between Refuge Legislation and Its Implementation in Practice. *Europa Ethnica-Zeitschrift für Minderheitenfragen* 78(3+4): 145–154.

Madison D.S. (2020). *Critical Ethnography: Method, Ethics, and Performance* (3rd ed.). Thousand Oaks: Sage.

MBK-News (2020). 'Strane seychas ne do nas, no i do koronavirusa bylo tak zhe': kak migranty i bezhentsy zhivut v Rossii na fone pandemii. https://mbk-news.appspot.com/ (accessed 19 March 2024).

McAuliffe M., Triandafyllidou A. (eds) (2021). *World Migration Report 2022*. Geneva: International Organization for Migration.

Molodikova I. (2017). The Transformation of Russian Citizenship Policy in the Context of European or Eurasian Choice: Regional Prospects. *Central and Eastern European Migration Review* 6(1): 98–119.

Nikiforova E., Brednikova O. (2018). On Labor Migration to Russia: Central Asian Migrants and Migrant Families in the Matrix of Russia's Bordering Policies. *Political Geography* 66: 142–150.

Nussbaum M. (2000). *Women and Human Development: The Capabilities Approach*. Cambridge: Cambridge University Press.

Nussbaum M.C. (2006). *Frontiers of Justice: Disability, Nationality, Species Membership*. Cambridge, Massachusetts: Belknap Press.

Nussbaum M.C. (2011). *Creating Capabilities: The Human Development Approach*. Cambridge: Harvard University Press.

Peña-Sullivan L. (2020). The 'Wrong Kind' of Immigrants: Pre-Migration Trauma and Acculturative Stress Among the Undocumented Latinx Community. *Clinical Social Work Journal* 48(4): 351–359.

Richey M. (2018). Contemporary Russian Revisionism: Understanding the Kremlin's Hybrid Warfare and the Strategic and Tactical Deployment of Disinformation. *Asia Europe Journal* 16: 101–113.

Reeves M. (2013). Clean Fake: Authenticating Documents and Persons in Migrant Moscow. *American Ethnologist* 40(3): 508–524.

Reeves M. (2019). The Queue: Distributed Legality, Bureaucratic Time and Waiting Work in Migrant Moscow. *Suomen Antropologi: Journal of the Finnish Anthropological Society* 44(2): 20–39.

Roman M.L. (2002). Making Caucasians Black: Moscow Since the Fall of Communism and the Racialization of Non-Russians. *Journal of Communist Studies and Transition Politics* 18(2): 1–27.

Russell J. (2005). Terrorists, Bandits, Spooks and Thieves: Russian Demonisation of the Chechens Before and Since 9/11. *Third World Quarterly* 26(1): 101–116.

Schenk C. (2013). Controlling Immigration Manually: Lessons from Moscow (Russia). *Europe–Asia Studies* 65(7): 1444–1465.

Schenk C. (2018). *Why Control Immigration? Strategic Uses of Migration Management in Russia.* Toronto: University of Toronto Press.

Schenk C. (2021). Producing State Capacity Through Corruption: The Case of Immigration Control in Russia. *Post-Soviet Affairs* 37(4): 303–317.

TENK (2019). *The Ethical Principles of Research with Human Participants and Ethical Review in the Human Sciences in Finland.* Helsinki: Publications of the Finnish National Board on Research Integrity TENK 3/2019.

The Insider (2020). 'Politsiya vovsyu lovit migrantov, vymogaya u nih den'gi za narusheniye samoizolyatsii' – Eksperty o tom, kak migranty vyzhinayut v usloviyakh pandemii. https://theins.ru/news/214694 (accessed 19 March 2024).

Urinboyev R. (2020). *Migration and Hybrid Political Regimes: Navigating the Legal Landscape in Russia*. Oakland: University of California Press.

Urinboyev R. (2021). Review of Kubal A. (2019) *Immigration and Refugee Law in Russia: Socio-Legal Perspectives*, Cambridge: Cambridge University Press, xxii, 205 pp. *Slavic Review* 80(2): 445–446.

Urinboyev R., Eraliev S. (2022). *The Political Economy of Non-Western Migration Regimes*. Cham: Palgrave Macmillan.

Zakharov N. (2015). *Race and Racism in Russia. Mapping Global Racisms.* Basingstoke: Palgrave Macmillan.

Zapata-Barrero R., Yalaz E. (2020). Qualitative Migration Research Ethics: A Roadmap for Migration Scholars. *Qualitative Research Journal* 20(3): 269–279.

How to cite this article: Kalm-Akubardia M. (2024). 'Many Benefit from You Being Undocumented Here': The Everyday Capabilities of Undocumented Immigrants in Moscow. *Central and Eastern European Migration Review* 13(1): 211–226.