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Migration to and from Welfare States

Lived Experiences of the Welfare–Migration Nexus in a Globalised World

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Chapter 1
Welfare and Mobility: Migrants' Experiences of Social Welfare Protection in Transnational and Translocal Spaces

Oleksandr Ryndyk, Brigitte Suter, and Gunhild Odden

1.1 Introduction

International migration can be understood not only as movements across the physical borders of nation states but also as mobilities across different social-welfare systems. These latter can be defined as multi-dimensional social protection mechanisms – constituted by a variety of different interlinkages between state, family, market and the third sector – which provide solutions for protecting their members against social risks. As migrants throughout the world make important contributions to their families' social welfare, migration often implies changes in the ways in which individual's and families' needs for economic and social-welfare protection are met. Employing both a transnational and a translocal perspective, this book aims to illuminate the role of social-welfare considerations in individual and family mobility (and immobility) through the lens of migrants' lived experiences and, thus, from their point of view. Through a variety of qualitative approaches, which include in-depth interviews, participant observation and multi-sited ethnography, the chapters collected in this volume shift the focus from the dominant – for this field of research – level of the state to the level of the migrants and their migratory trajectories, motivations and directions. Thus, instead of asking how the welfare state is challenged by immigration (cf. Bommes and Geddes 2000; Brochmann and Hagelund 2012; Olwig et al. 2011), this book explores how migrants' actual and desired mobility is shaped by their welfare repertoires (Righard 2008) or welfare

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resource environments (Levitt et al. 2017) and how their mobility or immobility, in turn, re-configures their welfare protection strategies.

This book goes beyond the Eurocentric understanding of the welfare state, which emphasises nation-state membership as the primary condition for entitlement to social protection. In order to overcome this bias, the chapters in the volume consider both institutionalised and non-institutionalised social-protection mechanisms and address different domains of social welfare, including unemployment and social protection, healthcare and education, child and elderly care and old-age pensions, etc. Concerning the sources of social welfare, we distinguish four main welfare providers or actors – namely the state, the family, the market and the third sector. Similarly, instead of treating migration as a one-time movement from place A to place B, this book defines it as a form of mobility, i.e. as an actual or imagined movement across space – not necessarily across a nation-state border – and as a practice with meanings attached (Adey 2017). The book's chapters address different types of mobility, among which immigration, emigration, circular migration, return migration and rural-to-urban migration within the same country.

The volume contributes to the existing literature on transnational mobility and social protection by bringing in empirical evidence from across the globe which illustrates the multitude of mechanisms in which welfare concerns shape individual and family decisions about mobility (and, sometimes, immobility) and vice versa. By introducing empirical findings and authors from across a variety of both Western and non-Western contexts, the book invites the reader to reflect on the role of global social inequalities in shaping migrants' motivations, aspirations and trajectories.

1.2 Welfare and Migration as a Research Field

The welfare and migration nexus is an established research field which, in the past few decades, has produced a rich body of literature. The main bulk of it, however, has traditionally resorted to the use of quantitative data and favoured the nation-state perspective with states being either the units of analysis or the key policy actors in the field. In his seminal work, which subsequently shaped the dominant line of inquiry in research on migration and welfare, Borjas (1999) found that the immigrants in the US who received welfare support were more heavily concentrated in more-generous welfare states compared to the US-born or to immigrants who did not receive welfare. This finding formed the basis for the 'welfare magnet hypothesis' which posited that interstate differences in welfare benefits act as magnets on the immigrant population. Since then, the welfare magnet hypothesis has undergone a great deal of scientific scrutiny. Thus, Giulietti et al. (2011) have analysed the effect of unemployment-benefit spending on immigration within and to Europe and found no effect of it on the patterns of internal migration of EU nationals and only a moderate effect on the immigration of third-country nationals, which partly confirmed Borjas' claims. In addition to the issue of self-selection among low-skilled versus high-skilled immigrants, the question of whether immigrants benefit more

from the national welfare than natives has been examined. Though sometimes contradictory, findings from the US, Sweden and Germany tend to agree that, when compared to natives, immigrants resort to welfare provision more frequently and for longer periods of time (Borjas and Hilton 1996; Gustafsson 2011; Hansen and Lofstrom 2003). In the UK, however, Blanchflower and Lawton (2009) found that, prior to the global financial crisis of 2008, the newly arrived immigrants from the EU member states in Central and Eastern Europe were more likely than natives or third-country nationals to be employed, signalling their positive contribution to the public finance. Other studies explored the patterns of welfare participation among different group of migrants. A recent study commissioned by the Migration Advisory Committee in the UK reported that, over their lifetime, immigrants from EU member states make an overall positive contribution, whereas immigrants from outside the EU make an overall negative contribution to public finance (Oxford Economics 2018). In Germany, the descendants of immigrants were found to be more likely to resort to public-welfare provision than first-generation migrants (Riphahn et al. 2010) while, in Spain, findings show that migrants with long-term residence were more likely to resort to public-welfare provision than migrants with shorter lengths of residence (Rodrígues-Planas 2012).

The sheer growth in the volume of quantitative studies examining the welfare–migration links can be explained by Western governments' rising concerns over increasing immigration as a threat to the sustainability of welfare states. Such concerns are rooted in what is known as the (ethnic) 'threat hypothesis' (Putnam 2007), a theory that assumes that growing ethnic or cultural diversity, which migration certainly contributes to, may undermine intergroup solidarity and trust which, in turn, are believed to be essential for the sustainability of the welfare state (Freeman 2009; Geddes 2005). Following the repercussions of the 2008 global financial crisis and the austerity measures introduced in its aftermath in a number of Western countries, migration in general and migrants' access to public welfare protection in the host country in particular, are again a hotly debated topic (Barrass and Shields 2017; Kalogeraki 2013; Powell 2017). From the mainstream media portraying migrants arriving *en masse* (Nordland 2015) to governmental bodies procuring evaluations on 'welfare tourism' (Ekhaugen et al. 2016) or 'the fiscal impact of immigration' (Oxford Economics 2018), migrants are being villainised, their 'genuine' motivations scrutinised and their rights to move and/or seek protection questioned. Since the macro-level perspective caters best for answering the dominant questions as uttered in the media and politics, it is thus no surprise that the consolidated field of research on the welfare–migration nexus has overwhelmingly favoured macro- and, to some extent, meso-level perspectives.

On the contrary, the micro-level aspects of the welfare–migration nexus, pertaining to migrants' decisions about migration, their needs for social protection and the (transnational) organisation thereof, have been largely overlooked. A more-recent scholarship on migration and welfare has employed a transnational paradigm, influenced by the seminal works on transnational migration by Glick Schiller et al. (1992) and Basch et al. (1994). More precisely, Basch and her colleagues define transnationalism as 'the processes by which immigrants forge and sustain

multi-stranded social relations that link together their societies of origin and settlement', emphasising that 'many immigrants today build social fields that cross geographic, cultural, and political borders' (1994, 7). The transnational turn in migration studies also highlighted the need to avoid methodological nationalism, defined by Wimmer and Glick Schiller (2002, 302) as 'the assumption that the nation/state/society is the natural social and political form of the modern world'. Accordingly, Righard (2008) points to the inherent dilemma between migrants' transnational mobile livelihoods and the national immobile protection frames to which they are subjected, while Levitt et al. (2017) conceptualise transnational social protection as 'social protection parcels' that are simultaneously 'stitched together' out of welfare provisions from both sending and receiving states, as well as the family, the market and the third sector. The literature on the micro-foundations of migrants' welfare concerns and decisions to migrate is growing but remains relatively fragmented. For example, scholars have studied separately the provision of care (Lutz 2008) and health services (Bada 2014) to migrants, the role and meanings of dual citizenship (Harpaz and Mateos 2019), migrants' agency for access to transnational social protection (Speroni 2018) and reciprocity between sending remittances and caregiving arrangements (Saksela-Bergholm 2019) from the perspective of transnational social protection. However, this body of literature still suffers from the lack of an integrated dialogue 'that sees health, education, secure retirement, and social security as increasingly constructed within and beyond the nation-state' (Levitt et al. 2017, 4). This book therefore aims to bridge this gap by focusing on welfare and mobility provisions from a transnational space approach.

1.3 Moving Beyond the Nation-State-Centred Approach

Esping-Andersen (1990) used the degree to which states assume the role of ensuring its citizens against social risks as a criterion to distinguish between different welfare-state regimes. Whereas in most European countries – and notably, though not only, in the Nordic countries –the state tends to offer some form of universal social-insurance schemes, market-based solutions are more common in liberal welfare states such as the US and other Anglo-Saxon countries. In many other countries, ranging from former communist states in Central and Eastern Europe to developing economies in Africa, Asia and Latin America, where neither the state nor the market succeeded in ensuring against social risks, family continues to play a vital role in individual social-welfare protection. In addition, actors from the third sector, such as charitable and faith-based organisations, are also important providers of social-welfare protection in both developed and developing countries. This book adopts a broader understanding of social-welfare protection, acknowledging the role of not only institutionalised (e.g. publicly funded/market-based schemes or third-sector organisations) but also the non-institutionalised sources of welfare, such as family and friends. It is addressed in relation to both the different actors catering for migrants' social-welfare needs (family, state, market and the third sector) and the

different domains of welfare provision (e.g. unemployment and social protection, healthcare and education, child and elderly care and old-age pensions).

1.3.1 Key Issues

Employing both a transnational and a translocal perspective, the main aim of this book is to illuminate the role played by individual and family social-welfare considerations in migrants' decisions about mobility (and immobility) and how such decisions, in turn, shape their own and their family's social welfare. It does so by focusing on the interplay between the different welfare-provision actors – the family, the state, the market and the third sector – in various socio-economic and geographic settings, for different domains of social welfare and in the context of a number of types of mobility.

Family is, without a doubt, an important source of social welfare and, thus, can shape individual aspirations for and actual practices of geographical mobility in a multitude of different ways. Zooming in on the role of family, the life-course and life-events perspectives are particularly useful in studying mobility choices and trajectories. The different chapters of this book ask how intergenerational care arrangements within families and individual life-course decisions (e.g. reproductive choices, retirement strategies) as well as the individual entanglements with existing gender power hierarchies, influence migrants' aspirations for and actual practices of geographical mobility. For instance, parents' concerns over their children's future education, combined with the family's challenging economic situation, can force them, in the first place, to seek employment abroad and, later, as demonstrated in Chap. 5, motivate them to settle permanently in the country of immigration. However, strong intergenerational family care expectations, deeply embedded in the national gender-making discourses, as shown in Chaps. 3 and 7, can sustain circular migration and, eventually, trigger return migration. Some specific cultural and economic family structures, such as the one-child family policy in China (see Chaps. 2 and 4), have the potential both to facilitate outmigration – for example, by encouraging the only child to move abroad for studies – and, later, to restrain it, by communicating moral expectations for the child to go back home to take care of his or her ageing parents in China.

State-provided or employment-related social-welfare provisions also affect individual and family mobility. For example, in countries with virtually non-existent or only rudimentary public-welfare provision accompanied by meagre employment opportunities – as in the case of Timor-Leste (see Chap. 12) – some may often find themselves forced to leave and seek work overseas to ensure a better future for themselves and their families left behind. While mobility may provide opportunities for socioeconomic betterment, the idea of sedentariness, deeply engrained in the logic of European welfare states, may constrain it, punishing mobility and encouraging immobility, as demonstrated in Chap. 10. In some cases, mobility which, in the first place, was caused by deficiencies in state- or market-provided

social-welfare protection, may actually lead to the further accumulation of social risks, as illustrated by secondary movements of Spanish-Ecuadorian citizens in the EU (Chap. 11). Similarly, other groups of migrants, such as the retired expatriate wives returning to Sweden after many years spent abroad (Chap. 9), may unexpectedly realise that their absence from the national labour market has undermined their rights to state-funded old-age social protection. Yet, those in possession of globally demanded or well-paid professions, such as the healthcare workers described in Chap. 8, have the ability to offset their potential loss of state-funded social protection caused by their emigration and, thus, choose a more mobile career.

In practice, however, it is often difficult to isolate the contributions made by different welfare-provision actors to individual migration decision-making. Hence, many chapters in this book engage with more than just one element of the welfare resource environment, encouraging the reader to reflect on the ways in which they are interwoven. For instance, illustrating how particular family circumstances can make public social protection crucial for the welfare of specifically vulnerable groups of migrants, Chap. 6 argues that the access to state- and city-provided social-welfare programmes becomes decisive for the integration and settlement of single Filipina mothers in Japan. Looking at the other direction of state–family interaction, Chap. 13 discusses how the lack of public old-age social protection in Sudan, reinforced by the strong familialistic discourses over children's responsibility for their parents' future welfare, influences the decisions of Sudanese migrants about their initial emigration to Europe and, later, their secondary movements within Europe.

1.3.2 Key Theoretical and Methodological Perspectives

By zooming in on migrants' own experiences, the contributions in this volume abandon the state-centred perspective of welfare and migration that dominates this research field and, instead, bring to light complex social protection strategies embedded not only in institutional but also in social and cultural settings. The transnational and translocal space approach used by the authors follows in the footsteps of other pioneering work on transnational social protection (e.g., Levitt et al. 2017; Righard 2008). Whereas Righard (2008) focuses on the shortcomings of restrictive national social-protection policies vis-à-vis the needs of mobile populations, Levitt et al. (2017) advocate for the need for a transnational social-protection framework for studying international migration and social protection. While our book draws on the key concepts developed by these studies, namely the 'welfare resource environment' (Levitt et al. 2017) and the 'welfare repertoire' (Righard 2008), it puts the emphasis on the actual and desired mobility of migrants shaped by their – quite diverse – welfare considerations (rather than on institutional settings). Thus, a common thread which goes through the different chapters in this book are the migrants' reflections on and experiences of geographical mobility seen in the light of their social-welfare protection. With the level of analysis being on individuals and households, and not nation states, the chapters explore how migrants' welfare-resource

environments or welfare repertoires encourage or restrict their geographical mobility. By employing the transnational and translocal space perspective, the book brings together different accounts of the nexus between welfare provisions and mobility into the conversation and, as such, contributes to an integrated account of the global social protection of migrant populations.

Furthermore, this book abandons the traditional and, arguably, outdated understanding of migration as a one-time movement from one country to another with the ultimate goal of settling permanently there. To this end, the book intends to mainstream a much broader understanding of migration, which it does by employing the concept of mobility. Thus, it aims to illustrate the complexities not only of migrants' actual itineraries – often involving previous experiences of mobility to other places – but also the rationalities of such choices as well as reflections about the prospects of further mobility in the near or the more-distant future. Hence, several chapters included in this volume address the different forms of geographical mobility – such as immigration to and emigration from welfare states, re-migration, circular and return migration, rural to urban migration – and asks whether and how welfare concerns were part of migrants' decisions about mobility.

1.3.3 Study Contexts

The contributors to this book are anchored in the traditions of Social Anthropology, Sociology and Human Geography, with a keen interest in enabling the reader to partake in the world described in the chapters through grounded and rich empirical material. In order to challenge the Eurocentric understating of the welfare–migration nexus, the editors deliberately sought submissions based on original ethnographic fieldwork and conducted in different parts of the world – not just in the Western contexts which are more common in this field of research. Thus, the chapters tell the stories of migrants who either originate in or have migrated to places in Europe (Austria, Iceland, Italy, the Netherlands, Norway, Poland, Romania, Slovakia, Slovenia, Spain, Sweden, Ukraine and the United Kingdom) and outside the continent (Australia, Brazil, China, Ecuador, Japan, the Philippines, Sudan and Timor-Leste). Together, they provide a myriad of reflections on and experiences of the various state, family, market and third-sector welfare provisions which shape migrants' modes and patterns of mobility (and vice versa). The main reason behind this diversity of study contexts, often featuring states with lower levels of institutionalised social welfare, is to challenge the Western monopoly on the concept of welfare. In so doing, we emphasise the need for a more inclusive and comprehensive operationalisation of the welfare–migration nexus, which would reflect better its complexities in terms of the domains, sources and experiences of migrants or their families.

1.4 Content of the Book

The 12 other chapters collected in this book cover a wide variety of topics, perspectives and geographical contexts. They address different types of geographical mobility, among which immigration, emigration, circular migration, return migration and rural-to-urban migration. They engage with different domains of welfare – such as unemployment and social protection, healthcare and education, child and elderly care and old-age pensions – and with different sources of it – the state with its formal institutions, the family, the market and the third-sector actors. Consequently, the task of arranging the chapters thematically or contextually would face a number of problems. Firstly, defining clusters or groups would inevitably result in blurred, stretched and questionable borderlines between topics, perspectives and the intersecting issues. Secondly, it would be counterproductive to this book's goal to offer readers an integrated reading of the welfare–migration nexus from a micro perspective. Finally, concerned with the imperatives of the topics, concepts and typologies, both the editors and the readers would run the risk of overlooking the perspectives of those who are at the centre of this welfare–migration nexus – individual migrants and members of their families. It is for these reasons that we have decided to restrain from dividing this book into thematic parts, letting its chapters stand on their own and leaving it up to the reader to choose a chapter at a time based on its topic or geographical context. At the same time, the common threads permeating them will help the reader to understand the ways in which these chapters are interconnected.

One such common thread which runs through several of the book's chapters is the role of the intergenerational contract in the mobility (or immobility) of the migrants and members of their families. It is often manifested in relation to childcare, gender roles and education. For example, **Yan Zhao and Yu Huang** (Chap. 2) discuss how the intergenerational contract and the family-based care regime in modern China shape the internal mobility of Chinese elderly parents. On the one hand, they find that being a supportive parent to the younger generation seems to be a more important factor than filial piety in influencing the elder generation's decision to migrate in order to help their adult children with childcare for the grandchildren. On the other hand, due to their double positionality of being both givers and recipients of care, the grandparents face a stay-or-return dilemma, for they fear that their stay may result in an economic burden for their children. **Svitlana Odynets**, in Chap. 3, demonstrates how Ukrainian female migration to Italy has challenged the hierarchical relationships of generations and gender in Ukraine, where the traditional family ideals intersect with gender contracts inherited from the Soviet period. She concludes that the persistence of the traditional image of *Berehynia* – the mother who takes care of her children and family – perpetuates the care mobility between Ukraine and Italy. It has recently become manifest in the emergence of a chain migration pattern wherein aged Ukrainian women in Italy begin taking longer holidays in Ukraine while their own daughters, other female family members or friends temporary replace them at work in Italy. In Chap. 4, **Alexander Gamst**

Page explores how Chinese students in Norway reflect on their aspirations for greater social and geographical mobility on the one hand and the social-care expectations of their ageing parents and the overall more-traditional Chinese society on the other. He argues that moral obligations towards one's parents in China may partly explain the somewhat fluid migration trajectories of this one-child-policy generation of Chinese students, as embedding oneself too deeply in a new community may pose the dilemma of whether to uproot oneself at a later stage or to abandon one's parents. **Magdalena Ślusarczyk and Agnieszka Małek** show, in Chap. 5, how Polish migrants' view of Norwegian education as a currency, which will give their children access to further studies and better jobs in the future, gradually transform their temporary stay in Norway into a permanent one.

Some chapters in this book look more explicitly into the ways in which state-, family- and employment-related social protection mechanisms intervene with migrants' decisions about mobility. For example, **Jocelyn O. Celero** (Chap. 6) demonstrates how the availability of different social-protection schemes to single parents in Japan enables Filipina mothers of Japanese-born children to safeguard and improve their socio-economic situation when they, first, transit from marriage to divorce and single parenthood and, later, climb from part- to full-time employment and, in some cases, even home ownership. She argues that these mothers do not passively rely on social-welfare protection schemes but, on the contrary, actively seek, make use of and later abandon certain schemes to destigmatise their position and status in Japanese society. She concludes that their aspirations to settle in Japan or return to the Philippines in the future are contingent more on their children's age, their investments and their visions of desirable retirement than on the immediate social protection available to them. In Chap. 7, **Mădălina Rogoz and Martina Sekulová** use the case of Slovak and Romanian female care-workers in Austria and show how the geographical proximity between Austria and the migrants' home countries on the one hand and the persistence of conservative cultural expectations towards mothers and women in the home society on the other, result in these care-workers' frequent travels back and forth between their workplace in Austria and home in Slovakia or Romania. They argue that the inadequacy of state-provided care services for children and the elderly and the persistence of conservative gender norms in their home countries sustain these care circulation patterns which only occasionally become disrupted by major life-course or family events which the authors call 'tipping points.' **Mojca Vah Jevšnik** explores, in Chap. 8, Slovenian healthcare workers' welfare-related considerations underpinning their decision to emigrate from Slovenia. She argues that the generosity of social benefits in destination countries is not a decisive factor for healthcare workers emigrating from Slovenia. Instead, their globally demanded profession is their most valuable financial safety net. Given that healthcare workers are themselves providers of welfare, the chapter also discusses the workers' ethical considerations about leaving patients behind. In Chap. 9, **Catrin Lundström** examines how Swedish expatriate wives become systematically excluded from national social-welfare provision and how they relate to the national political ideals of gender equality and the dual-earner family model upon their return to Sweden.

Finally, the role of citizenship as a factor enabling or hindering mobility echoes strongly throughout the book's chapters. For example, **Anna Wojtyńska and Unnur Dís Skaptadóttir** discuss, in Chap. 10, how Polish migrants' entitlements to unemployment and other work-related benefits as holders of EU citizenship in post-crisis Iceland, combined with the imperfect EU regulations in the domain of social protection, discourage their return migration to Poland and lead to geographical and social immobility. On the contrary, **Polina Palash and Virginie Baby-Collin** (Chap. 11) illuminate the ways in which EU citizenship enables naturalised Spanish-Ecuadorian migrants to manage their social protection across multiple countries over their life span as they circulate between Spain and the UK. They argue that such mobility, however, does not necessarily guarantee them an accumulation of social rights and, instead, often leads to an accumulation of social risks. In Chap. 12, **Claire C. Millar** looks at the role of the emigration of Timorese migrants – holders of Portuguese citizenship – to England for their understanding of social welfare for the economic development of their home country. Arguing that Timorese migrants utilise the labour market's economic protections and state-based welfare in support of their own, family-based protection frames, she elucidates the culturally differentiated ways in which migrants and their families piece together unique welfare solutions. Finally, in Chap. 13, drawing on the life stories of transnational Sudanese families whose members reside in Sudan, the Netherlands and the United Kingdom, **Ester Serra Mingot** asks what role migrants' considerations for securing old-age pensions play in their decisions to move to and stay in certain places. Focusing on naturalised Dutch Sudanese migrants' secondary movements from the Netherlands to the UK, she argues that migrants' decisions to move are less motivated by the differences in the objective 'welfare generosity' between the two countries but, rather, more by their opportunities to secure their own and their families' social protection in a manner deemed more rewarding from the family's point of view which, in its turn, is rooted in the practices of intergenerational reciprocity.

1.5 Instead of a Conclusion

This book contributes to the exiting literature on transnational mobility and social protection by bringing in empirical evidence from across the globe which illustrates the multitude of mechanisms in which welfare concerns shape individual and family decisions about mobility (and, sometimes, immobility) and vice versa. By focusing on individuals, households and families rather than on nation states, the book's contributors distance themselves from the macro- and nation-state level of analysis in the field of migration and welfare research. Inspired by the recently emerging and rapidly ground-gaining theorisations of mobility and social protection, the authors of this book do not simply follow in the footsteps of the pioneers (Levitt et al. 2017; Righard 2008). They take a step further by developing their own theoretical lenses – such as, for example, a theorisation of major life events as 'tipping points' in migrants' trajectories (see Chap. 7).

Given the broad scope of topics, geographical contexts and theoretical perspectives covered in this book, issues such as gender, culture, intergenerational relations and citizenship become common threads that permeate and stitch together the 12 other chapters of this book. As a gendered process in which culture plays an important mediating role, migration is both a response to and a cause of household welfare insecurity in many countries around the world. At the same time, culture is not something static, predetermined or incapable of adaptation. On the contrary, when viewed in the context of social welfare, culture shapes and is simultaneously shaped by existing social protection structures. The intergenerational processes of care production and reproduction inevitably bind gender and culture together. Thus, the life-course and life-event perspectives prove to be essential analytical tools for applying the micro level of analysis to mobility and social protection. Hence, several of the book's chapters illustrate how geographical mobility is shaped by individual and family needs for social protection over the course of migrants' lives. Moreover, in some cases, families' welfare-mobility projects might stretch over several generations.

Despite the emphasis on migrants' subjective rationalities, the book's chapters often highlight the political nature of many dilemmas faced by migrants and members of their families and expose the national welfare systems' inherent sedentary bias. Thus, acknowledging the role of contextual factors (i.e. social welfare and migration regimes and bilateral/international social-protection agreements), a number of the chapters demonstrate that citizenship plays a crucial role in steering human mobility. Leaving aside its symbolic and emotional meanings, the formal possession of the citizenship of particular countries (or, in China's context, the right to city residence *Hukou,* see Chap. 2) becomes a key factor enabling or disabling onward, secondary and return mobility. The issue of citizenship as one element of migrants' welfare-resource environment brings the reader closer to the concept of agency and resourcefulness in the welfare–migration nexus. Individual agency can help to explain the variations in migrants' ability to piece together their own and their families' social-welfare security despite the seemingly uniform restrictions imposed by institutionalised welfare policies. The future theoretical endeavours could more explicitly incorporate the concept of agency in the studies of transnational mobility and social protection.

This book is designed for a broad range of audiences, from established scholars and policy-makers to graduate students of Sociology, Political Science, Anthropology and Human Geography who are familiar with academic texts and interested in transnational mobility and social protection. We hope that the readers will find the contributions to this book insightful and valuable for their understanding of migrants' experiences of social-welfare protection in a globalised world.

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Chapter 2
The Mobility of the Elderly and Family-Based Care: A Case Study of Chinese Migrant (Grand)Parents

Yan Zhao and Yu Huang

2.1 Introduction

This chapter discusses the mobility of Chinese migrant elders in relation to the family-based care regime in China. Chinese older people migrate mainly for 'family reasons', most notably to take care of the younger generations who have migrated and/or to satisfy their own old-age care needs (Li and Gan 2017; Li and Huang 2018). A recent survey on older migrants in the metropolises of Beijing, Shanghai, Guangzhou and Shenzhen shows that 35.2% of the respondents migrated for the purpose of helping with childcare for the third generation (their grandchildren), 19.3% to take care of the second generation (their adult children) who have migrated and 23.1% for their own old-age care needs (Li and Huang 2018). An important context for this 'family-reasoned' migration is that family is still the most important and reliable care provider in China. There is an intergenerational mutual reliance or unwritten contract in care arrangements within the family. While the second generation relies on their parents for childcare, the older generation is dependent on the second one for care in their old age (Eklund 2018; Zhao and Huang 2018; Zhong and Li 2017). This chapter focuses on older grandparents who have migrated to take care of their grandchildren and explores both how the trajectory of their mobility is shaped by the intergenerational contract on care and how migration may possibly change this intergenerational contract.

The elderly migrants whom we study are commonly called in Chinese *sui qian lao ren* or 'accompanying older migrants'. The word 'accompanying' indicates that they migrate because of their children's migration. Internal migration in China was

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strictly controlled during the era of state-planned economy and large-scale internal migration did not start until the early 1980s, shortly after China's economic reform began in 1978. Because the development of the market economy required the free mobility of labour, it triggered most notably – but not exclusively – a mass rural–urban migration of cheap labour (Chan and Zhang 1999; Li 2004). As for the accompanying older migrants, the initial migrants were their adult children who often migrated to big cities for better jobs or a career. Therefore, the migration of these elders can be regarded as a continuation of the large-scale internal labour migration process.

The analysis offered in this chapter is based on qualitative data from 16 in-depth interviews with ten older migrant grandparents living in one residential area in Shenzhen, a major city and economic centre near Hong Kong. In order to explore the links between the mobility of these migrant elders and the care needs and arrangements within the family, we analyse in particular their decisions to move and their future plans regarding the dilemma of whether to stay in Shenzhen or return home.

Since care arrangements within the family constitute an intergenerational 'contract', it is essential to discuss the mobility of migrant elders in relation to the intergenerational relationship. Our discussion on this aspect will be embedded in recent theoretical debates on Chinese descending familism or neo-familism (Obendiek 2017; Yan 2016, 2017; Zhao and Huang 2018) which describe the significant changes that have taken place in Chinese family life and new perceptions of traditional ideals and norms regarding family relations in China – in particular the notion of filial piety and the changing power relations between the first (the elderly parents) and the second generations. This chapter contributes not only to knowledge about the migration of older people in China but also to discussions on continuities and changes in current Chinese family life in the context of migration and the effect of the One-Child Policy. Furthermore, it proposes to add a welfare perspective to our understanding of continuing internal migration in China and highlights the connections between the migration of the elderly and China's family-based care regime into which the care arrangements within the family are incorporated.

2.2 The Chinese Family-Based Care Regime in the Context of Social Transformations

The Chinese family-based childcare and elderly-care practices are closely related to the Confucian norms of filial piety – the core and basic norm which regulates intergenerational ties and family relations. Traditionally, there are two interrelated central aspects of filial piety that children must obey: respect and absolute obedience to parents and filial support and care of them in their old age (Zhong and Li 2017). Filial support and care means that children have an obligation to provide for, serve and care for their elderly parents and arrange their funerals after their deaths. Filial

piety is also fundamental to and shapes grandparenting norms in China (Ko and Hank 2014; Silverstein et al. 2006). Because a married child is expected to fulfil their duty of filial piety by living with their elderly parents, grandparents are likely to live with their grandchildren, which makes them a natural source of childcare (Chen et al. 2000; Ko and Hank 2014; Yasuda et al. 2011). Traditional grandparental roles under the Confucian family culture tend to be related to fostering intergenerational bonds and extending family heritage (Cong and Silverstein 2012).

Despite concerns about the erosion of filial piety by modernisation and rapid social changes (Yeh et al. 2013), scholars commonly agree that filial piety still plays a major role in contemporary family lives in China (e.g. Cheung and Kwan 2009; Lin and Yi 2011), albeit in new and revised forms or even with radical changes (e.g. Eklund 2018; Santos and Harrell 2017; Yan 2003, 2016). One central change concerns the decline of parental power, with the result that filial piety today no longer requires the submission and unconditional obedience of the younger generation (Yan 2003; Zhong and Li 2017; Chen et al. 2011). In his theorisation on descending familism, Yan (2016) points to a new model of intergenerational solidarity that builds on an intimacy between the older and younger generations and a new, more flexible, family structure in which the focus and meaning of life flow downward to the third generation – i.e. the grandchildren. In particular, Yan considers the emergence of intergenerational intimacy, in the form of increased communication and understanding as well as the sharing of emotions, as the major breakout from the traditional Chinese family culture, where this kind of intimacy was suppressed to maintain hierarchy and parental authority (Yan 2016).

This change in the perception of filial piety also influences how family members perceive their obligations and roles regarding child and elderly care. Zhong and Li (2017), for example, argue for an investment perspective through which to understand intergenerational relationships. Without the element of unconditional obedience in the perception of filial piety, the older generation no longer takes filial care by their children for granted. Consequently, they actively seek to secure their future old-age care by investing in the younger generation, not only financially through helping them to purchasing a home but also emotionally, by caring and strengthening the intergenerational bonds (see also Wang 2010; Xiao 2014; Zhang 2005). Understood from this perspective, grandparents providing childcare can also be a strategic and emotional investment by the older generation in exchange for more secure old-age care and emotional support from the younger generation in the future.

Although our earlier study on migrating grandparents (Zhao and Huang 2018) to some extent confirms this investment and exchange perspective, we argue that the intergenerational care arrangements within the family are not merely cultural practices based on certain norms of family relations. Rather, they are part of wider institutional arrangements on care and welfare, shaped by social and related family and labour policies. For example, the heavy reliance on grandparents for childcare is also due to insufficient institutional support in contemporary China: statutory maternity leave in China is 98 days, up to a maximum of 4 months (ILO 2012), while the average age for enrolling a child in kindergarten is approximately 3 years. Grandparents often have to fill this childcare gap. Meanwhile, the relatively early

retirement age in China (50 or 55 for women and 60 for men) enables grandparents to be the main labour force for childcare. Grandparents providing childcare has thus been institutionalised through policies and institutional arrangements. Meanwhile, the overall policy of elderly care follows the principle of being 'based on individual families, backed up by the communities, and supplemented by different institutions' (State Council of PR China 2017). Family members, primarily children, are still expected to play a major role in providing care for their senior parents. Therefore, intergenerational care arrangements are an adaptive family strategy based on a *functional solidarity* within a welfare and care regime. More importantly, when elderly grandparents migrate to help with childcare, the migration itself is part of the family welfare strategy and functional solidarity.

We therefore find it necessary to add a welfare perspective to the cultural perspective on family norms in order to understand the mobility of the migrant parents. One concept which we consider to be relevant here is the 'welfare resource environment' (Levitt et al. 2017), which helps to map and analyse individuals' access to social protection and welfare in a transnational space created by global migration. Though the migration we look at is domestic, it shapes a similar translocal space in which the older migrants navigate the care needs and resources to find the best solution for both their family members and themselves. Consequently, we analyse how the elderly position themselves with a view to balancing the different care needs and required resources and how we can understand the mobility of these older people through these positionalities.

2.3 Research Context and Methods

The empirical base for this chapter consists of 16 qualitative semi-structured interviews, carried out in two rounds, with ten elderly migrant grandparents living in one residential community in Shenzhen. Because of its special geographical location bordering Hong Kong, Shenzhen became China's first special economic zone in 1980 – soon after Deng's 'economic reform and opening-up policy' – and has since then developed from a town centred on the fishing industry, with a population of 332,900 (Zhang and Qi 2006) into one of China's most important economic centres, a modern city with a total registered population of around 12.5 million at the end of 2017 (World Population 2018). Shenzhen is thus a city of migrants, its population reflecting the pattern of China's mass internal migration that started during the 1980s (Ye 2013), including a high proportion of older migrants, the majority of whom moved to follow their adult children (Li and Huang 2018). Shenzhen's government has adopted a series of incentive policies to attract young talent to go there and settle down. These policies include economic rewards and relatively easy procedures for moving Household Registration (in Chinese, *Hukou*) – a system which has been used to regulate people's access to social protection and welfare (Wu 2013), including public health and care – and more favourable conditions for purchasing housing. Consequently, Shenzhen has become an attractive city for young

migrants, particularly those who are well-educated and are seeking better career opportunities or/and a more Westernised lifestyle. The children of our participants belong to this category. They all have a university degree (two have Master's degrees), moved to Shenzhen because of job opportunities and have their *Hukou* in Shenzhen.

Until very recently, there have been strict restrictions on elderly migrants moving *Hukou* in Shenzhen – at the time of the first round of interviews, no participants had their *Hukou* there. Since each province or municipality has its own separate social and medical insurance programmes, without a *Hukou* in Shenzhen, the participants have very limited access to the local welfare benefits and social services. For example, if they fell ill, they would have to travel back to their home towns for medical services if they are to get reimbursed for the cost of treatment. However, right after the first round of our interviews in late 2015, Shenzhen had started to ease the requirements for migrant older parents to move their *Hukou* (Shenzhen Government 2016). Among the participants in the second round of our interviews, two had already moved their *Hukou* to Shenzhen and one was in the process of applying. However, this does not solve their problem of how to access pension and medical insurance in Shenzhen. According to the regulations, to obtain access, the older migrant must not only have a local *Hukou* but must also have never received a pension elsewhere in the country (Shenzhen Social Insurance Fund Administration 2018).

The community we chose to recruit participants from also has a high proportion of residents with a recent migration background, reflected in the high number of households who rent as opposed to owning their home. New migrants often rent due to high house prices in Shenzhen. Even though the first generation is often willing to support them financially, the assets that the migrants and their families accumulate elsewhere are often not enough for a down-payment in Shenzhen. This community also has housing units with different price levels, which enabled us to recruit participants with varied socio-economic backgrounds. We used the local social work station as the initial door-opener and thereafter the snowball technique to recruit participants who met the following two criteria. Firstly, they had to be in their 60s or thereabouts and to have mainly migrated to help with childcare. We therefore focused on migrants who were relatively healthy and not heavily in need of care themselves. Secondly, they must have lived continuously in Shenzhen for more than 6 months. In addition to socio-economic background (both their own and that of their children), we considered other social variables in the recruitment to ensure that both male and female, rural and urban, single-child and non-single-child parents and both maternal and paternal grandparents are represented in our sample. All ten participants recruited to our study – six females and four males – had moved to Shenzhen from other provinces. They were between the ages of 58 and 69 and had lived in Shenzhen between 3 and 10 years at the time of their first interview. An overview of the participants' socio-demographic background can be found in Table 2.1.

The second author conducted the interviews in two rounds, the first in late 2015 and early 2016, when she interviewed eight participants. In this round of interviews, we focused on how the decision to move was made and how the participants

Table 2.1 Participants' socio-demographic background at the time of the first interview

No.	Pseudonym	Age	Household type	Home province	Educational background	Years in SZ	Spouse's residency	Number/ gender of children
1	Grandma Sun	65	Urban	Henan	Senior middle school	10	Shenzhen	1 son
2	Grandma Yi	69	Urban	Shandong	Primary school	10	Widowed	1 son
3	Grandpa He	67	Urban	Zhejiang	University	5	Shenzhen	1 daughter
4	Grandma Zhu	58	Rural	Heilongjiang	Primary school	3	Hometown	1son/1 daughter
5	Grandpa Wang	61	Urban	Jiangxi	Senior middle	7	Shenzhen	1 son
6	Grandma Jin	63	Urban	Shandong	Junior middle school	9	Hometown	1 son
7	Grandma Li	68	Rural	Hunan	Illiterate	6	Hometown	2 sons
8	Grandpa Fan	64	Rural	Hebei	Junior middle school	4	Shenzhen	1 daughter
9	Grandma Wu	63	Urban	Hunan	Junior middle school	6	Hometown	1 son
10	Grandpa Zhou	67	Urban	Heilongjiang	Senior middle school	5	Shenzhen	1 son

experienced the changes in their life after migration. The second round took place exactly 2 years later – the plan being to follow up the same eight participants. The background for this new round of interviews was that we registered a dilemma from the first-round interviews that most of the participants face concerning the question of whether to stay in Shenzhen or return home. In the second round interviews, we intended to explore this dilemma further and address the question of the mobility of these elderly migrants. We managed to interview six of the eight participants – of the other two, one had returned due to illness and the other did not respond to our inquiry. To compensate for the missing data, we recruited two new participants. In other words, among the ten participants, six were interviewed twice, two were interviewed once in the first round of data collection and the remaining two were interviewed once in the second round. Each interview lasted around 1 h and took place at the participants' homes.

2.4 The Decision to Move

All the participants said that their move to Shenzhen was initiated by their children, upon the birth of a grandchild. However, they responded differently to the request. Three participants, Grandma Sun, Grandma Yi and Grandpa Zhou, responded positively and decided immediately to move permanently to follow their children. As parents of a single child, they all expected to move to follow their only child, even before their children asked them. For them, moving was just a matter of time. By contrast, the remaining seven were reluctant to move – mostly because going to Shenzhen would represent a major upheaval in their lives – and they all said that they were used to the places where they had spent their entire lives. They therefore stated that moving to Shenzhen was a choice of no choice. In this part of the analysis, we look at these two groups separately. We start with the older (grand) parents who had expected to move.

2.4.1 To Move Permanently: Fear of Becoming the 'Empty-Nest' Elderly

As mentioned above, three participants had intended to move, even before the initiation by the second generation. This intention was based on their own old-age care needs. For example, Grandma Sun says:

> My son worked in a big company in Shenzhen. He was always very busy and had little time to rest. After he had decided to settle down in Shenzhen, we also started considering moving to follow him, so that we could take care of him. If we chose to stay in our hometown, we would be 'empty-nest elders' (*kong cao lao ren*), which is awful. There were lots of reports on empty-nest elders in the media. I felt panic each time I heard or read about them. Then my son also needed us to come when his wife was pregnant. Someone needed to take care of his baby. So we decided to come! My son also said the family should be together… At that time, I was already retired, but his father was about to retire the year after. So we decided that I would come first, and then he would come as soon as he retired. … I thought Shenzhen was a good place for old-age care, because the hospitals and doctors here are much better than those in my hometown. So when we decided to come, it was based on consideration for our future.

Even though the direct cause of Grandma Sun's migration was the birth of her grandchild, the intention to move had existed ever since her son decided to settle down in Shenzhen. For her, moving to be near their only child is a natural choice – one which is quite representative among the three participants. Grandma Yi, a widow and mother of a single son, also talked about her fear of becoming an 'empty-nest elder', a term which is widely used in China to refer to older people with no children or whose children have left home and very often moved away – a category considered as a highly vulnerable group in discussions of the big challenges which China faces concerning the issue of elder care. Therefore, in their decision-making, their own future care needs and their expectations of filial care from the second

generation are major considerations. At the same time, these expectations are also intertwined with their wish to support the second generation. For example, the above quote demonstrates parental love – the participant's worry about her son who 'was always busy and had little time to rest' and thus her wish to take care of him and, later, his child.

For Grandma Sun, migration seems to be a win–win situation: by migrating and living close to their son (they live in a separate apartment in the same neighbourhood), the two generations can take care of each other, which is also the case for Grandpa Zhou. In fact, these two cases share several similarities. In both, the couple decided to migrate together. In addition, they are the only two families who can afford to have their 'own' apartment after migration – which is, as we discuss later, considered an ideal living condition by our participants. Both said that the second apartment is funded by a cross-generational arrangement: the older generation provides the down-payment, while the younger generation pays the loan. Grandpa Zhou said, 'After we decided to move, we sold our apartment and car at home, and used the money as a down-payment for the second apartment in Shenzhen. We agreed to buy it in our son's name. Everything will be his after we die anyway'. Therefore, for Grandma Sun and Grandpa Zhou, the decision to move permanently was not merely based on the fact that they have only one child to rely on but also that it is economically feasible for them to spend their old age in Shenzhen. This, however, was not the case for Grandma Yi.

While both Grandma Sun and Grandpa Zhou showed great parental love in expressing their support of the second generation, Grandma Yi emphasised the duty of filial piety and was rather pragmatic in her account of her decision to move permanently. When explaining why her provision of childcare is necessary, she compared herself to a nanny and considered herself a better caregiver, both in terms of the family's economy and in terms of trustworthiness. As to the relationship between her own need for old-age care and her provision of childcare, she said: 'When I get really old, I expect filial care from my son. Like now, I help him take care of his child, then later, he will take care of me'. The explicit exchange perspective is closely related to her status as a widow and the mother of a single child, which makes her even more vulnerable in the family-based elderly-care system. So she had to emphasise the duty of filial piety and her economic and practical contribution to the second generation in order to secure her future old-age care. Therefore, the different discourses which the participants deploy (parental love vs filial piety) also mirror their different strategies for securing care in their old age based on the available resources.

Interestingly, although all the participants had the intention of moving to follow their children, none had brought it up with their children. Instead, they all waited for the second generation to take the initiative. If moving to follow an only child is a natural choice for the three participants, the birth of a grandchild seems to be a natural timing for the migration. Meanwhile, it also shows that moving to fulfil a role as a care-providing grandparent seems to be the new norm regarding the intergenerational care arrangements, something we expound on in our discussion of the cases of elders who were less willing to move.

2.4.2 *Grandparents 'on Duty': Temporary Migration and a Choice of No-Choice*

Research shows that elderly people are less likely to migrate and will often experience more difficulties adapting to their new environment after migration (Li et al. 2017). The majority of our participants were reluctant to move and expressed great attachment to the place where they had lived for their entire lives and where they had a wide network, a familiar lifestyle and habitual routines. For them, moving to Shenzhen was a hard decision. When justifying their decision, they all emphasised the needs of the second generation, with a perception of their roles as supporting parents and grandparents. As an illustration, Grandpa Wang said:

> I only have one son, so I do not have a choice. My daughter-in-law became pregnant shortly after they got married. My son wanted us to come and take care of her and later the baby. The parents of my daughter-in-law could not come, because they were taking care of their son's baby. We also discussed hiring a nanny, at our expense, but my son worried about safety issues. After all, you do not feel totally assured letting a stranger take care of your baby. Finally, we decided to come. Already around that time, we had decided that we would leave once the baby got older. Otherwise, I have nothing to do here. I had no other expectations. I came to finish my mission. It was like switching duties, off-duty [retirement] in my hometown, and then on-duty in Shenzhen.

Grandpa Wang describes their migration to Shenzhen as grandparents going 'on duty'. It is seen as temporary migration because, as soon as the duty or 'the mission' is fulfilled, he and his wife would return. Additionally, he described the decision-making process, where he did consider other alternatives for childcare but found out that actually he had no other choice than to move. This description of 'fulfilling the duty of childcare' and migration as a choice of no-choice is very representative of this group of participants. For example, Grandmas Jin and Li also used similar expressions like 'grandma on duty' (*nainai shanggang* in Chinese) or 'I came to do voluntary work' (*yiwu laodong*, also meaning unpaid work).

Migration as a choice of no-choice thus concerns the issue of how to meet the need for childcare with the given resources within the family – the extended family involving not only generations, but also the in-laws. Most of our participants, including those who were happy to move, mentioned the alternative of hiring a nanny, yet they all considered themselves to be a better provider of childcare than a nanny, in the sense that they are more trustworthy and devoted because of their blood ties to their grandchildren, described as their 'own flesh and blood' (*qin gurou*). By contrast, a nanny is considered as a stranger or outsider (*wairen*). In addition, there is the issue of finances. Several participants, like Grandmas Zhu, Jin and Li, indicated that helping with childcare is also a way of relieving the economic burden for the second generation, as is also reflected in the quote from Grandpa Wang. When considering hiring a nanny, he stated that this would be at their expense – i.e. as the older generation. Among our respondents, not all the families can afford to hire a nanny. Even among those who can, they consider this to be an

unnecessary expense and would rather save their money for other things, like housing and the children's education.

The quote from Grandpa Wang also touches upon another question: Which set of grandparents should be responsible for the care of the grandchildren? Since Chinese families traditionally follow the patrilineal structure, it has often been the parents of the husband who live with the young couple and thus become the natural caregivers of the third generation. However, the One-Child Policy has greatly challenged this practice (Eklund 2018). Even though two participants referred to patrilineality to account for their decision to move for the purpose of childcare, we find that the question regarding which set of grandparents should come to take care of the third generation is much more complex than the principle of patrilineality alone. For example, Grandpa Wang did not refer to patrilineality to account for his decision to move, even though it was his son whom he and his wife were to help. Instead, the emphasis is on the 'only' son, implying 'If we do not help him, who else shall we help?' As to their in-laws, they have several children, so they had to choose. Indeed patrilineality may be an unwritten rule here but, as we interpret Grandpa Wang, what he meant was, as parents of one sole child, you do not have to choose – you know who you are going to help and to whom you are to fulfil your obligations as supporting parents.

We also find that deciding which set of grandparents should take the responsibility for childcare is sometimes arranged between families-in-law. Grandma Jin moved to Shenzhen alone. Implicitly, she considered her migration as a sacrifice which the first generation makes for the second generation, because the migration entailed a long-term separation between the two members of the elderly couple. During the interview, Grandma Jin expressed great concern for her husband and looked forward to moving back and being reunited with him. When asked whether her son's family-in-law, who happened to live in Shenzhen, ever helped with childcare, she sighed and said:

> They run a restaurant and are quite busy. They are also older than me. The tradition here is that the paternal parents should take care of the grandchildren. But I think, I have time, so I should help my son as much as I can. After all, we did not give them any financial support when they bought their apartment.

Grandma Jin tried to provide a good explanation for why her son's parents-in-law could be exempt from the responsibility of childcare, an explanation that is more commonly acceptable, such as a lack of time, a greater age and the tradition of patrilineage. However, the reasons why *she* chose to come is the last two sentences: the importance of being a supportive parent and their failure to provide financial support for the second generation's housing. Therefore, providing childcare becomes a necessary compensation. Grandma Jin's case once again confirms the importance of being supportive parents, for paternal and maternal parents alike. Childcare is only one form of parental support, which the two families-in-law can negotiate in relation to other forms of support, based on the different resources which each family possesses (e.g. money) or is able to deploy (e.g. time and energy).

2.5 The Return-or-Stay Dilemma

In the first round of interviews, most participants, especially those who were originally reluctant to move, expressed a strong desire to return to their home town or village. This was often expressed through narratives about the challenges and difficulties they had experienced after migration, which often concerned their relationship with the second generation (tensions/conflicts caused by different lifestyles and opinions on child-raising and the loss of parental power and autonomy), social adaptation (loneliness, and lack of a social network and belonging), accommodation situation (small, cramped apartments and lack of their own space), and rights to public social services and benefits related to *Hukou* (e.g. they have to travel back to their own homes for medical reimbursement) (see Zhao and Huang 2018). In addition, they all emphasised that childcare is demanding, never-ending work, further contributing to their lack of a social life. The interviewees who came to Shenzhen alone also expressed great concern about their spouses who had remained at home. Nevertheless, they all stayed because, while living in Shenzhen, they became even more convinced of how dependent the second generation is on their help with childcare and housework. Although the people who had already moved permanently did not experience the same stay-or-return dilemma as their counterparts, they mentioned the same challenges and difficulties, to varying degrees. From time to time, they also compared Shenzhen with their home towns and became quite nostalgic. We have therefore decided to include their perspectives when exploring the stay-or-return dilemma to understand the mobility of older migrants. In particular, we explore the dilemma in relation to the intergenerational care arrangements within the family, in which the participants are positioned as both (re)sources and recipients of care.

2.5.1 Grandparents as an Important Care (Re)Source for the Nuclear Family

As already mentioned, when they decided to move, most participants thought that they would return home as soon as the new-born baby was a little older, although nobody could say exactly when. In fact, several participants were still assisting with childcare, even though their grandchildren had reached school age. Grandma Jin has been in Shenzhen for 11 years, the longest among the participants. She said:

> Today's young generations are too busy! While they concentrate on their careers, it is us elders who come to help. This is so common! Look at this neighbourhood – it's the same in every family. Before Yangyang (grandson, age 10) was born, I told them I would go home when he was a little bit older, like when he does not need me to take him to school or pick him up. But I cannot imagine how they would manage without me. Before, I needed to drop off and pick up Yangyang at kindergarten and later school, because his parents did not have time. Now he is big enough to walk alone. Still, someone needs to be at home when he gets home from school. His parents normally come home around 8 in the evening, sometimes

> even later. Then who can make food for him? … Now, my daughter-in-law is pregnant again, so I don't know when I can go back [sigh].

This quote expresses two representative aspects. First, there is always a need to care for the third generation. Second, grandparents caring for school-aged children is quite common. Grandpa Zhou said dropping off and picking up children at kindergarten is often the task of grandparents. Once he attended a family event at his grandson's kindergarten and around half of the adult participants were grandparents. Grandpa Wang also said that, in addition to normal school, he also used to accompany his grandchild to private tutoring and hobbies. Both Grandma Sun and Grandpa Wang reported that they normally cook two meals a day, one specifically for the second generation, who come home late. Several participants say that they have remained in Shenzhen to also take care of the second generation. Like Grandpa He said: 'In name, we are here to take of care of the grandchild; in reality we are here to make their [the second generation's] life easier'.

We also notice a paradox in our participants' narratives about their children. On the one hand, they complained a lot about the second generation being so busy that they barely had time for their elderly parents. Therefore, the latter feel lonely and have no emotional support. On the other hand, they feel proud of their children, who have careers in a metropolis like Shenzhen, thanks to which they are likely to climb upwards through the social stratification system. The children's migration and settlement in Shenzhen is thus regarded as an achievement, as it is for the whole family. Consequently, the participants expressed their willingness to support their children. Despite their complaints about how demanding childcare is, several participants told us: 'As long as they need me/us, I/we will be here to help'. This willingness can also be understood as a continuation of Chinese parents' heavy investment in their children's (often their only child's) education for the purpose of lifting the family's economic status, as Vanessa Fong described it in *Only Hope* (Fong 2004). The self-sacrifice implied in these narratives also features one aspect of Yan's 'neo-familism': the notion of 'sacrificing the small self for the realization of the greater self, with a concrete, affective and materialistic goal' (Yan 2017) which, in the context of our study, is the success of the second generation.

The participants also talked about themselves as an irreplaceable care resource in respect of their emotional bond with the third generation. In particular, the paternal grandmothers expressed doubt as to whether their daughters-in-law, whom they consider to be too occupied with their career, are capable of being a good care-giver for the children. Grandma Li, who has two sons, said:

> I have another son at home. So I think I will go back [for old-age care]. The problem is who will take care of my grandson? Last time, I went back for a wedding, he was crying for me all the time. So I had to come back the same day!

Grandma Li seems to have no doubt about where she will be for her own old-age care. When considering her return, she even thought about taking her grandson back to her home town. She said, 'I thought it was a good solution. Both we [the grandparents] and his uncle can take care of him, right? But his father said that the education in Shenzhen is much better'. Thus, the third generation's education also becomes part of the dilemma of whether to stay or to return home. Remaining in

Shenzhen can also be regarded as part of the educational investment in the third generation, which has become 'an intergenerational joint mission' (Goh 2009, 6).

2.5.2 *Balancing Care Needs and Resources Within the Family*

Several participants, all female, moved to Shenzhen without their husbands. For them, their return-or-stay dilemma is intertwined with a strong desire to reunite with their husbands – some expressed guilt at not being there to take care of him. Grandma Wu said: 'He was so used to me taking care of him, and had never even made food before. Now he has to do everything himself'. Grandma Jin also said:

> My husband does not have good health. I feel bad each time I think about leaving him alone at home. I notice I am getting old too, and I often feel tired. I really miss my husband and would like to go home!

Here, Grandma Jin's wish for reunification also indicates the emotional need of the old couple to support each other.

Sometimes, other family members' care needs also play a role in the participants' struggling with the stay-or-return question. For example, both Grandma Zhu and Li have two children. Their husbands chose to stay home to help the other child with childcare. Grandma Zhu said:

> We have been separated for five years now. As parents, we look at the children's needs. If they still need us, we will certainly continue to help them. Then I'll have to stay in Shenzhen, and he'll stay at home [sigh]. It's not easy for young people in Shenzhen. Look at the apartment – it is too small. There is no room for another person. In addition, one more person means more expenses. They talked about buying an apartment, but prices are rising all the time. Too much pressure! It is really difficult. So I think I will return one day.

This quote shows that, when grappling with the return-or-stay dilemma, the participant navigates different care-related needs within the family, such as caring for grandchildren both in Shenzhen and in the hometown, the second generation's need for support with childcare, their own needs for care and, not least, the emotional need to be with their spouse. These needs entail different trajectories for older migrants, even though their own needs for care were only implied between the lines. However, the participants navigate not only the care needs within the family but also the available care resources. In addition, they calculate the costs in order to find the best solution to meet these needs. This is not only demonstrated in the above-cited quote, but also in an earlier quote from Grandma Li, who even considered taking her grandson with her when she returned to her home town. The high cost of living in Shenzhen is also commonly referred to as a factor in favour of return, which contradicts their earlier narratives about themselves as an irreplaceable provider of childcare. Moreover, the common narrative on the high cost of living also demonstrates the older generation's understanding of the younger generation regarding their life situations in Shenzhen (e.g. 'it is not easy for young people in Shenzhen'). Implicitly, it also entails the older generation's fear of being a burden, which will be expounded upon next.

2.5.3 Dependency on Filial Care and Fear of Being a Burden

While both Grandma Zhu and Grandma Li, the two participants who have more than one child, seem quite sure where they will spend their old age, the single-child participants are less certain. Their uncertainty surrounding their future old-age care is also intertwined with their dilemma as to whether to stay or return home. On the one hand, they only have one child to rely on; on the other hand, their experiences of living in Shenzhen seem to have convinced them that staying in Shenzhen is not realistic, or the best solution, not least because of the high cost of living and expensive housing. However, we do have one exception: Grandpa Wang, the participant who changed the most between the two rounds of interviews. In the first interview, he expressed a strong wish to return home as soon as he and his wife had 'completed their mission' as caring grandparents. In the second interview, he was much more open and positive about the idea of staying.

> It was true that I wanted to return. But my wife said, family should stay together. Only when we stay together are we a family. Besides, my son does not want us to return. … City life is not so bad after all. And very convenient! Now we are much more familiar with the city, so we feel much more relaxed. My son wants to take care of us. He really is a filial son. We only have him but luckily he never lets us down. We are very proud of him. In fact, if they do not consider us troublesome, of course we would stay. This is the best. But sometimes I am worried that we would become a burden for him instead of helping him. But he said 'Don't worry, mum and dad! Soon we will be able to buy a second apartment. I will buy one in the same neighbourhood for the convenience of taking care of you'.

Comparing the two interviews, we find that his change in attitude might be an outcome of a change in his social life. While he spoke much about the loneliness and difficulties of adapting to city life in the first interview, in the second he talked a lot about his 'migrant elder' friends and social activities. This is the background to his utterance 'city life is not so bad after all.' Although he was the only one in this group who had somehow changed his mind, the passage quoted above also includes other important information, which is also representative.

Earlier, we pointed out that most participants, including Grandpa Wang, did not emphasise filial piety and care when accounting for their decisions to move. However, as can be seen in this quote, this does not mean that they do not have this expectation. The reason for not stressing filial piety and care is based on their understanding of the second generation's life situation and challenges, as we illustrated earlier and is closely related to the fear of being a burden, as expressed by Grandpa Wang. Earlier studies on intergenerational relationships state that today's elders no longer take filial piety from the younger generation for granted (Zhong and Li 2017) and, even when they are middle-aged they have fears about their old-age care that derive partially from doubts about the filiality of their children (Fong 2004). However, our study shows that these doubts are not necessarily about the second generation's willingness to fulfil their filial duties but more a question of their capacity to do so. In other words, it is not that these older parents do not expect filial care but that they dare to expect it after seeing all the pressures the second

generation already face regarding their careers and the expectations of investing heavily in the third generation (Goh 2009).

Like most participants, Grandpa Wang complained about the cramped living conditions in the first interview. He said: 'Each time I went to the toilet, I felt uneasy and nervous, because I was always thinking someone might be waiting outside'. However, once his child had a concrete plan to buy another apartment to accommodate the older generation, it seemed to give him hope, making him more optimistic about the idea of staying. Based on our cross-case analysis, we consider the families' housing and economic situation to be an important factor influencing the older parents' mobility. For example, the fact that Grandma Sun and Grandpa Zhou could migrate permanently is closely related to their economic ability, as they are able to buy their own apartment. All the participants, except widowed Grandma Yi, consider living separately from, yet close to, the second generation as the ideal living situation if they were to move permanently with their spouses. We believe that the importance attached to living separately is related to their intention to maintain at least some autonomy, which we have argued is even more reduced in connection with migration (Zhao and Huang 2018). Their reduced autonomy is also reflected in their great uncertainty about their future and lack of decision. For example, Grandma Jin, when asked whether she had thought about being reunited with her husband in Shenzhen, answered:

> It's no use me thinking about this or that. It is up to the young generation, and how they make arrangements for us. We are not the ones who make money and decide. Like we say, we wanted to stay together, then they say, no, we cannot afford to have you both here. Then what to do? Right? So I think I'll just let them decide. … As a matter of fact, we seldom discuss it.

The powerlessness which Grandma Jin expresses demonstrates the older generation's dependency on the second generation's filial care, particularly for those who only have one child. Meanwhile, this quote once again illustrates the older generation's uncertainty about how much filial care they can realistically expect – another paradox which shapes the elders' return-or-stay dilemma.

2.6 Conclusions

Based on our analysis, we conclude that being a supportive parent to the younger generation seems to be a more important norm than filial piety in regulating the intergenerational relationship that informs the older generation's decision to migrate to follow their children and their trajectory after migration. Although the expectation of filial care does exist, it seems to have little effect on the mobility of the older grandparents, because the participants are uncertain about how much filial care they dare to expect, given the limited time, energy and economic capacity of the second generation. As shown in our analysis, when talking about their dilemmas and future plans for old-age care, most participants tend to be practical and realistic, focusing

on the actual care needs and what is the best solution in light of the resources available within the family rather than the cultural norms. In this context, family means the extended family, which may be spread across different geographical locations and include not only the different generations but also in-laws and siblings.

Inspired by the concept of the 'welfare resource environment' (Levitt et al. 2017) in transnational migration studies, we propose the conceptualisation of a *translocal care space* comprising transversal generational, sibling and in-law relations to understand the mobility of older migrants in relation to the care needs and arrangements within the family. Consequently, the mobility of the elderly can be understood as being directed by how these older migrants position themselves within the translocal care space. For example, our analysis demonstrates that, with the new norm of supporting parents, our participants tend to position themselves more as care (re)sources than care recipients, which also indicates that they prioritise the younger generation's care needs above their own. Meanwhile, the stay-or-return dilemma can be understood in relation to the older generation's dual positionality of being both care (re)sources and recipients, creating a paradox: while positioning themselves as the necessary care support for the younger generation, they also fear that their staying might constitute an economic burden for their children.

Based on these findings, we propose a reconceptualisation of the migration of older parents as a form of welfare migration, as opposed to family migration, in order to highlight its functionality and the logic that ultimately concerns questions of welfare. The elderly migrants' stay-or-return dilemma also indicates that the migration of the younger generation has greatly challenged the reciprocity in the intergenerational arrangements on care and thus the sustainability of the family-based care model, particularly concerning elderly care. In this context, parents with only one child are even more vulnerable.

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Chapter 3
Keeping It in the Family: Rotating Chains in Women's Transnational Care Work Between Italy and Ukraine

Svitlana Odynets

3.1 Introduction

Olena[1] left for Italy at the age of 51 in 2007 with the goal of saving up to buy a flat for her daughter's family. Before migration, she worked at a big Ukrainian state company and had a high-level managerial position although she did not receive her salary for months. At first, Olena crossed the Italian border as a tourist. As her visa expired after 10 days, she began to search for her first Italian job as an undocumented migrant. Fortunately, a neighbour from Ukraine, whom Olena met by coincidence in the street, knew one Italian family which was looking for a *badante* (Italian for 'caretaker') for their 90-year-old mother. Olena accepted the offer. She visited her family in Ukraine for the first time 2 years after her initial migration, once she had received an Italian residence permit. After 6 years in Italy, Olena finally bought a flat for her daughter's family and paid for all the necessary renovations there. She is now still working in Italy to buy a flat for herself in Ukraine. However, a few years ago, like some of her other female friends, Olena shifted to working in Italy for periods of 3 months at a time. She now takes turns with another Ukrainian woman who, like her, also wanted to visit home in Ukraine more often. She explains that she does it 'for herself' at the expense of higher earnings. When Olena goes to Ukraine, she has a period of rest in which to renovate her psychological and physical condition. However, she also takes care of her female relatives' children while their mothers work abroad for short periods of time – a new trend facilitated by the lifting of the Schengen visa requirements for Ukrainian citizens in June 2017. Once, Olena looked after her daughter's children while the daughter took off to work in Poland together with her husband. Another time she looked after

[1] All migrants' names and other private information have been anonymised.

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her daughter-in-law's children so that the woman could go with her husband (Olena's son) to the Czech Republic and work there. In the interview, Olena stressed that it is important not only to earn money abroad but also to help the young families to be together, especially when one of the partners (in this case, men) works abroad. Otherwise, as Olena feels, migration would break up families.

Olena's personal story illustrates a new pattern which has recently started taking shape in the transnational space between Ukraine and Italy, countries where persistent deficiencies in the public social-care system perpetuate a traditional gender order in which women, not men, continue to bear the main responsibility for children and elderly care even when they are working and their male partners are not. As Ukrainian female migrants in Italy are getting older (Markov et al. 2009), more and more of them are opting to 'share' their job in Italy with another migrant woman. They not only manage to organise care across the borders through various forms of communication and interactions from a distance (Baldock 2000) – as at the beginning of their migration – but they also create new patterns of short-term transnational mobility within their established long-term migration and expand opportunities for other members of their social networks.

The embedding of social practices in multiple places are widely discussed in migration studies on gender and transnationalism (Baldassar 2007; Hondagneu-Sotelo and Avila 1997; Parreñas 2001). While many studies (Engbersen et al. 2013; Friberg 2012; Zimmermann 1995) often focused more on the patterns of permanent settlement and integration in the destination country, such practices of permanent circulation between two countries were considered mostly as 'incomplete migration' (Okólski 2001). As the transnational approach became more established (Faist 2000; Glick Schiller et al. 1992; Portes 1996), studies emerged showing how migrants settle themselves successfully in mobility (Morokvasić 2004), developing their 'transnational capability' (Ali Ali et al. 2001) and using their mobility as the key social resource in a transnational space. This pattern is not new for Central European female migrants working in Western countries. Bauer and Österle (2016) discuss how middle-aged or older women from Romania and Slovakia commute for care work to Austria and are confronted with care obligations in their countries origin. As Mirjana Morokvasić (2004) shows in her studies on Polish migrant women in Germany, they have also developed a rotational system for living in transnational space. Morokvasić describes how *leaving the country* becomes a strategy for *staying at home* (Morokvasić 2004, 11), which is made possible mostly through newly achieved economic and social capital gained in a transnational space. She stresses that the fall of the Berlin Wall for Eastern European women became a new opportunity not only to be 'free to leave' but, more importantly, to be 'free to leave and come back' (2004, 1).

However, the essential difference between the abovementioned contexts and Ukrainian women's mobility to and from Italy is that the latter extends beyond EU borders. This significantly undermines their freedom of movement and, consequently, requires another level of reorganisation of their migration experience. The possibility of travelling back is especially important in the case of Ukrainian women migrating to Italy. These women started their migration mostly with the aim – often successfully achieved – of supporting their children financially and paying for their

university education as well as buying them an apartment (Fedyuk 2011, 2016; Havrylyshyn 2014; Näre 2012; Vianello 2014). However, it has now become clear that they did not return permanently to Ukraine after their goal had been realised. Sabrina Marchetti (2013), discussing self-managed rotations between Ukrainian, Russian, Georgian and Polish migrant women in Italy, underlines that this kind of circularity is neither a preliminary stage to permanent migration nor a consequence of special state programmes but, rather, individual migrant decisions taken with the assistance of migrant personal networks, established relationships with employers and the social and economic capital gained earlier in their migration (Marchetti 2013, 349, 359). What is missing in the article as well as in other studies about short-term transnational mobility within long- established female migration is an analysis of the interrelations between gender, family structures and intra-family care arrangements in connection with the welfare state of both countries.

Therefore, the main objective of this chapter is to trace why and in which ways mature Ukrainian female migrants, with 10–15 years in Italy as domestic workers, invent new ways of knitting together their 'workplace' and their 'home', physically separated between the two countries, instead of settling in Italy permanently or returning to Ukraine for good. This paper also emphasises how they create new economic opportunities for their female relatives, helping them to commodify their reproductive work and accumulate new economic and social capital in this transnational care space.

I start by focusing on the recent changes in the welfare states of Ukraine and Italy, then present the key concepts of my analysis, showing how the logic of the rotational system is, to some extent, predicted by public narratives on the distribution of gender roles in post-Soviet Ukraine. Later I briefly discuss the main costs and benefits for migrant families left behind before, finally, presenting my main empirical cases, where the interviewed women explain why they choose to commute between the two countries more often. I look into their narrative, taking into account the role of migration culture and the inter-generational contract in Ukraine.

3.2 The Main Features of Ukrainian and Italian Welfare States in the Past Decades

To some extent, Italy and Ukraine are parts of the same puzzle in terms of the distribution of care responsibilities within society. Italy, as are other Southern European countries, is characterised by a rapidly ageing population and an insufficient social welfare system and has long faced an increasing demand for care for the elderly (Tomassini and Lamura 2009). In the Italian familialistic welfare state (Esping-Andersen 1996), the main public expectations and system of care service lay on the shoulders of women, although more and more women participate in the labour market outside the home. Earlier, this demand was met by unmarried women who migrated from southern Italy to the northern parts of the country. However, over the

past three decades this lacuna has been solved by importing care in the form of immigrant women from the Philippines, Morocco and Eastern and Central European countries. Ambrosini (2011, 36) points out that such practices have led to the emergence of an informal welfare state in which Italian families are the main actors hiring new, unregistered migrants and managing their underground work. Significantly, Italy granted the largest number of regularisations in the EU through six amnesties in 22 years (Ambrosini 2011), amnesties which, in fact, enabled the appearance of one of the largest and fastest developing Ukrainian migrant communities in the EU. Today, according to official statistics, about 235,000 Ukrainians live in Italy – the fourth largest non-EU immigrant community after Moroccan, Albanian and Chinese citizens (Ministero del Lavoro e delle Politiche Sociali 2018) – of whom, in 2018, 72.3% held long-term residence permits and 80% were women. This is the highest share of women among all migrant communities in the country (Ministero del Lavoro e delle Politiche Sociali 2018).

Ukrainian women began migrating to Italy in the second half of the 1990s, under the conditions of protracted economic stagnation, pervasive unemployment and delayed payments of wages due to Ukraine's transition from a socialist planned economy to a market economy. In the 1990s, millions of Ukrainian women and men either lost their jobs or continued to work almost without pay for many months. However, the situation for women was even worse than that of men. Solari (2017) argues that unemployment at that time should be regarded primarily as a gendered issue. With the worsening economy, gender inequality on the labour market of former Soviet countries increased even further, evidenced by the fact that in Russia, for example, women were paid 30% less than men for the same work (Ashwin 2005). Additionally, with the rapidly falling standard of living and the increasing competition imposed by the 'free market' ideology, many people experienced a sharp psychological crisis – a decrease in social status and a depreciation of the competencies they had acquired in the Soviet system. Therefore, facing unemployment or irregular wages and confronted with an increasingly ineffective social welfare system in their home country, hundreds of thousands of Ukrainian women found migration to Italy to be an attractive option that allowed them to provide a better standard of living for their families and to pay for the education of their children left behind in the country of origin.

The majority of Ukrainian women arrived in Italy in the late 1990s and 2000s on short-term tourist visas and they found themselves in a very vulnerable position. The travelling cost them around US$ 1500–2500[2] which they paid to unofficial agents and middle-men in exchange for a passport, tourist visa and transport to Italy. Sometimes they also paid for obtaining their first job in Italy, without any official work contract. Over the next 20 years, they have gone from living underground in Italy without any social guarantees, to receiving their legal status and developing established social networks. They have even managed to create the new rotational

[2] In comparison, the minimal wage in the year 2000 in Ukraine was US$ 19. The money for migration was mostly loaned by relatives and friends who already worked in Italy at that time.

system which allows them to travel to Ukraine more often and to stay much longer than previously. To enable this model within extended families, two major changes in the regularisation system took place. Firstly, in 2007, Italy introduced the National Agreement for Domestic and Care Work, which allowed employers to make one contract with two employees instead of only with one. It began to be used by some Italian families, mainly under pressure from female migrants who, after 10–15 years working in Italy, wanted to have a more relaxed work schedule. As Marchetti (2013) stresses, both migrant women and employers are satisfied with this pattern. However, it has not become the main pattern and most Italian families still prefer traditional contracts with only one employee (Marchetti 2013, 352). Secondly, in 2017 the Schengen visa regime between EU countries and Ukraine was lifted. Ukrainians now have the right to travel freely to EU countries and stay there without a visa for up to 90 days in any given 180-day period. However, they do not have the right to work in the EU – except in Poland, where foreigners have the right to start to work without a national visa. In fact, the visa-free regime is not the main factor that has made the rotational system in Italian families possible; or the 'rotational' contract to work, both of the women involved need to have legal long-term work permits in Italy. Usually, this type of contract is preferred by women who, as Marchetti (2013) points out, gained sufficient economic and social capital during their long-term migration in Italy. In other words, having a rotational contract is a privilege earned and not a widely accessible work pattern for all Ukrainian female migrants working in Italy.

3.3 The Rotational Care System

By and large, the circulation of care is at the centre of women's migration when female migrants from countries with weak welfare systems (Constable 1997; Parreñas 2001) sell their reproductive work to families in developed countries, filling the care gap which is created back at home with the help of their female relatives who remained behind. One could expect that migrant women would see Italy, where they have worked for many years, as the country the most important to them but this is not the case. On the contrary, judging from the analysis of recent trends in this migration, Ukrainian migrant women reinforce their symbolic involvement and physical presence in Ukraine and level it up to balance their role. For the purposes of discussing their involvement in the social context within and across the national borders of both countries, this chapter mobilises the concept of the *rotational care system* when women begin to substitute for each other in both reproductive and productive work along the borders.

To analyse the rotational care system involving two or more Ukrainian women[3] working in shifts for the same Italian family I use Arlie Hochschild's concept of *care chains*, defined as a 'series of personal links between people across the globe based on the paid or unpaid work of caring' (Hochschild 2000, 131). Helma Lutz and Ewa Palenga-Mölenback (2012) apply the concept to social reproductive work between Ukraine, Poland and Germany. They point out that, when Polish women migrate to Germany, the gap in care responsibilities in Poland is filled by Ukrainian women. However, Ukraine finds itself at the end of the female migrant care chain, as the corresponding care gap left by Ukrainian women migrating to other countries is not filled by women from abroad (Lutz and Palenga-Möllenbeck 2012) but, instead, by their female relatives.

Secondly, I argue that these patterns of care circulating in transnational space between Ukraine and Italy can be seen from an anthropological point of view as a wider inter-generational phenomenon – i.e. the result of complex dynamics in the relationships between different generations of women in Ukraine, as well as of changes in public discourses that were apparent in Ukraine both before and after the collapse of the Soviet Union (Fedyuk 2011; Odynets 2016; Solari 2017; Zhurzhenko 2008).

3.4 Data and Methods

This chapter is based on the results of my ethnographic fieldwork conducted in Italy and Ukraine over several phases – in 2012–2013 and 2015 and via Skype in 2019. A total of 45 semi-structured interviews were conducted with Ukrainian women in four Italian cities – Florence, Rome, Padua and Venice. Additionally, in the same period I conducted 20 interviews with family members left behind and with migrants who had returned to Ukraine. The typical settings for the interviews were churches, migrants' homes, schools and the parks where Ukrainians meet up in Italy. The informants came from all parts of Ukraine, were aged from 21 to 67 years and had different social, educational and marital statuses, either with or without children.

This chapter focuses on four migrant stories that demonstrate a new emerging pattern of rotational migration among women with a long work experience in Italy. Among my informants were 51-year-old Olena, who migrated to Italy in 2007 to save up for a flat for her daughter's family, Valentina, 56 years old, who left for Italy in 2008 to earn money to improve her living conditions, Olha, 65, who migrated to earn money for her daughter's university education and Nina who, at 32 years old, came to Italy without any immediate financial need. Nowadays, the first two women take turns with other Ukrainian women who have also worked in Italy over many years, while the two others take shifts with women from their own extended families.

[3] It happens more rarely that Ukrainian women work in pairs with a woman from another Eastern European country.

3.5 Ambivalence and Contradiction in the Gender Contract in Post-Soviet Ukraine

The main gender contract in the Soviet Union concerned the working mother, who performed a dual function as both a builder of the communist future through her work outside the home and the mother of new generations of workers (Temkina and Rotkirch 2002). The state 'helped' women to perform their task of caring for their children through a wide-ranging socialist support system of kindergartens, free public healthcare and education (Zdravomyslova 2010). After the collapse of the Soviet Union, millions of women found themselves saddled with the same dual burden but with strongly reduced state support (Zdravomyslova 2010). Temkina and Rotkirch (2002) claim that the contract of the working mother did not disappear; instead of state support, women became reliant on the mobilisation of their social networks and relatives. In this manner, the neoliberal project of shrinking state services and benefits has resulted in the 'privatization of motherhood and the transfer of responsibility for reproductive work, once shared with the state, to individual women' (LaFont 2001, quoted in Solari 2017, 34).

The other significant rift appeared in the discursive space. Together with the neoliberal changes in the economy, processes of national revival became highly visible in public debates in the 1990s. A particular place was set aside for the return of the 'traditional Ukrainian family' in opposition to the Soviet family model with the 'working mother' (Fedyuk 2011; Zhurzhenko 2004). According to these new ideas, women were expected to return to the home (Rubchak 2001; Zhurzhenko 2004), as men were considered the main and sole breadwinners in the family. This idea was metaphorically embodied through the cult figure of *Berehynia* (from the Ukrainian *berehty* – to preserve; Berehynia literally means *a protectress*) – 'the great goddess, domestic madonna, hearth mother and today as the nation's mother' (Rubchak 2001, 150). From the early 1990s, *Berehynia* embodied 'native femininity' (Kis 2005, 105), the 'proper woman' called to preserve the Ukrainian family as well as the whole nation. Rubchak (2001) shows how the myth of Ukrainian matriarchy takes a variety of forms in the different historical periods in Ukraine and how easily it was activated in post-Soviet Ukraine, 'seducing contemporary Ukrainian women into a false sense of their centrality' (Rubchak 2001, 150). The *Berehynia* image still plays an important role in migrants' self-representations and self-reflections.

All these economic and discursive transformations mostly hit the generation of middle-aged women, those born in the 1950s and 1960s and raised during the communist rule (Solari 2017). Zhurzhenko (2001) shows that, right after the collapse of the Soviet Union in the early 1990s, these women, being in the heyday of their economically active years, suffered a much stronger economic, social and personal marginalisation than any other social group in Ukraine. Raised according to the values of the Soviet gender contract, they placed much value on being employed. Their sudden unemployment, which hit them shortly after 1991, strongly affected them, as they saw their social status and psychological stability decrease (Ashwin 2000). They did not see themselves as being able to adjust to the new rules of the

game under 'free market' conditions (Solari 2017; Zhurzhenko 2008). Simultaneously, the family pattern whereby the family lived together with the grandmothers became less popular, despite the social instability discussed above. The symbolical childcare role of the grandmother, which was very important in the Soviet period and the early 1990s was no longer so necessary both because many young mothers, also unemployed, stayed home and took care of their children themselves and because the idea of living together with the grandmother started to lose its attractiveness for many families in post-Soviet Ukraine. The quote below, by 52-year-old Maria, clearly illustrates the conditions under which many Ukrainian women in the 1990s had to make the decision to emigrate to Italy:

> I was in a very bad economic situation when I worked in the radio factory and it closed down. In Ukraine, everything was bad, everything was closing. And no money, it was difficult to provide clothes and even food for our children. When I was laid off, I couldn't find a new job, it was suffocating. Later my daughter had a child. I was with them for a while, because she was a student. And we kept this up for ten months. Then we sent my grandson to kindergarten, still without money. When my daughter started her second year at university, I left for Italy and, since then, I have been sending presents and money to Ukraine every month.

Today, among Ukrainian migrant women in Italy, the most numerous are middle-aged women who often have grown-up children and grandchildren in Ukraine and who Jennifer Utrata calls 'the real partners of young mothers in post-Soviet space' (Utrata 2008). By the end of 1990s, the average Ukrainian family found itself stuck between new discursive ideals embodied in the national rhetoric and an extremely difficult economic and social situation – with the strong figure of the dual-role grandmother, the vague professional identity of young women/mothers and the somewhat marginalised figure of the father/man, which I discuss in the section below.

3.6 Responsibilities in a Migrant Family: All the Way around

Many men also emigrated from Ukraine to provide for their families; however, their migration is accepted in the public discourse as a 'normal' breadwinning activity. Sometimes both partners migrate abroad to earn money for their children, leaving their elderly relatives behind. Moreover, in some families the decisions about migration and how to perform care obligations are made in a mutual agreement between the partners. However, in this section I focus on the men who remain at home in Ukraine without assuming care obligations, whereas their wives work in Italy, because these cases comprise the majority in my fieldwork. For example, 56-year-old Valentyna's experience illustrates a quite typical distribution of care in a migrant family for many Ukrainians. She left for Italy in 2008 at the age of 45. The reason for her migration was to earn money to buy her brother out from their jointly owned house, as he had sued their mother to split the house and get his share of the money. Valentyna left two children, three and 9 years old, with their father (her husband)

under the mutual agreement that he would take care of the children. She quickly understood that her partner had betrayed her with another woman and was not looking after the children. She took the children away and left them with her parents. Later, when her parents died, her daughter started to care for her younger brother. Two years ago, having received all the required permits, Valentyna started to work in Italy for shorter periods of 4 months, taking turns with another Ukrainian woman who had been working in Italy for 15 years and who also needed to visit her family in Ukraine more often. Now Valentyna has a goal – to earn money for her son's education. She also said that, when she returns home for 3 or 4 months, conflicts sometimes arise with her daughter about the distribution of responsibilities and the power in the family:

> We had a misunderstanding with my daughter, I didn't pay her enough attention. She wanted to have me, not my money. I explained to her that if I hadn't gone, there would have been no money for us. And my son asked me as well: 'Mom, when will you come home and start working here?' I explained to him that I cannot earn here even half the amount I get in Italy. Much has been lost and I would like to hear from our president – how long do we need to work in Italy to be able to return home, to Ukraine, finally? This is very difficult, many families are destroyed.

Despite the expectations of some feminist scholars (Lutz and Palenga-Möllenback 2012) that, as female migrants become the main breadwinners for their families, ideas about gender order will change, the previous gender order inherited by Ukraine from the Soviet era did not relieve the double burden placed on women. Women still embody *caregiving* – both physically and discursively – and are still seen as responsible for all care drain and care gain, even when they have become the main economic providers for their families. Such expectations are often internalised by the women, as is evident from their narratives and choices related to migration. Thus, migrant women are being blamed for the many divorces and breakups of family relationships, in spite of the reasons and circumstances under which they decided to migrate. However, in many cases female migration could *de facto* represent grounds for divorce or a desperate solution in the situation where men declare their unwillingness/inability to provide for their families. One of the reasons for this, as illustrated by this quote from Lesia (50 years old), could be the allegedly radical transformation of women's capabilities and behaviour after they move abroad for work:

> When I went abroad for the first time, I became very independent in problem-solving and earning money, and my husband told me that either I should go back to being the one I used to be, or he would not need me.

Women very often stress their husbands' unwillingness to discuss the migration as a solution for raising the family income and argue that men often prefer to eliminate themselves from family negotiations, as 47-year-old Lesia states:

> My husband was left with the children…I went against his will, because I don't know how other men reacted – he didn't want me to go, and he also felt this inability to support the family, and felt this, our family crisis. Later he told me one day that we should not count on him. He didn't let me go voluntarily, but he also did not stop me.

It is revealing that, in the Ukrainian public discourse, migrant women are expected to be responsible for the husbands they leave behind, for their moral and physical well-being and for the integrity of their family. In numerous interviews during my fieldwork, women expressed their feelings of responsibility (and of guilt) for their husbands who started to drink or experienced personal degradation after their wives' migration. Iryna (54) shows below how, to solve this problem, women organised care for the husbands with the help of their adult children (as a rule, daughters):

> When I go home, nothing changes, my husband doesn't touch anything. He has a saucepan and a plate for his own use. And he says he feels bad when I come home. His colleagues come, they drink and sleep in the house, and I am a nuisance in my own home. I plan to return to Ukraine forever in a year. My husband understands that the house is mine too. But he feels better when nobody disturbs him. My daughter goes there to control her father; she knows that when he gets his pension he starts a drinking bout, and there can be intoxication. This situation lasts a week, then everything stabilises.

Strikingly, over the last three decades, no new public discussion has emerged in Ukraine about the necessity of distributing care obligations to other members of society – e.g. fathers or brothers – encouraging them to take over the home tasks of the wives and mothers who have emigrated. Anthropological studies about how Ukrainian fathers and husbands deal with their wives' transnational migration and which personal transformations they are going through are virtually non-existent – only the narratives of women are present in current research. One of the reasons for this could be men's unwillingness to talk with other people (i.e. with academic researchers) about their experiences. I can confirm this through my own long experience of trying to recruit men for interviews. I tried to reach them even through their close friends or neighbours but without any success. Summing up, all care responsibilities within migrant families lie on the shoulders of mothers, daughters, other female relatives and sometimes their female friends. It forces them to create their own networks of co-responsibility and cooperation and take turns between paid work and care in order to optimise the emotional and physical costs and benefits of family life.

3.7 New Forms of Family Mobility Capital

As in Olena's case, Olha takes turns in working for an Italian family in order to manage her responsibilities towards the family left behind. Olha, who left for Italy 11 years ago to earn money for her daughter's university education, is now 65 years old. After working in Italy for just 2 years, she had earned a sufficient sum of money to achieve her goal. She then returned to Ukraine to live with her husband. Shortly after, the Italian family where she had worked before, called and asked her to come and take care of their older relative. Olha agreed but only on the condition that she would work in short periods of 4 months and return to Ukraine for the same amount of time. The Italian family accepted this proposition. Olha shares her shifts with her brother's wife, who had already worked in Italy for 4 years and who also wanted to

be more involved now in the life of her family in Ukraine. The women agreed to do shifts every 3–4 months. According to Olha, they both feel that they succeeded in their current situation. This case is an example of migrant empowerment, as it was Olha who demanded (and gained) this flexibility from her Italian employer.

Another informant, 57-year-old Natalia, tells us that, in the beginning, the rotational system allowing women to visit Ukraine more often was only an idea circulated in migrant networks. Later, however, migrants dared to discuss this alternative option with their Italian employers and even suggested that they would look for another Italian family if their requests were not met.

> My family where I am working now… At first they didn't even want to hear about it. To have two *badante* instead of one? It seemed too complicated for them. But I never put my job before my family. I can find another job, but who saves my family for me? Finally they agreed and even wrote the official contract with me. It works well now.

Therefore, having obtained all the official documents and some financial capital, women started to prioritise the needs of their Ukrainian family before those of the Italian one. When Natalia has some holiday time, she goes to the hospital for general treatment because, as she says, her Italian job worsens her health and psychological wellbeing. However, like many other women, she prefers, as she says below, to continue working in Italy until she earns the right to an Italian pension – to which one is entitled at the age of 67 after at least 5 years working and paying taxes regularly:

> I do not plan to stop yet because I want to have my pension here, I want to get that. If someone could find a woman who is ready to share shifts with me, I would go to Ukraine more often, it would be very nice for me and my family.

Nina, 32 years old, was the youngest informant I met during my fieldwork. I contacted her after an interview with her mother-in-law, who had been working in Italy for almost 10 years. When Nina gave birth to her child, she stayed at home alone for many days because of her husband's (the child's father) work away from home. Nina's mother-in-law, who is happy to see her first grandson as often as possible, organised shifts with her female friend working in Italy and went to help Nina every 4 months. Nina told me that having the help meant that she started to feel better psychologically and even decided to continue with her education. Now Nina is studying and both women help each other to look after the child. Nina's husband comes home only at weekends because he also works in shifts.

However, most of the women I met during my fieldwork were thinking of creating new economic opportunities for women within the family. As Nina's determination to gain a higher level of education illustrates, the rotational system can enable women to enhance their human capital. Sometimes, the result of these rotations can be a newly achieved personal stability and an increased sense of agency among a woman's female relatives. As long-term migrants come back more often to Ukraine and take on more of the caring responsibilities at home, the other women in the family receive more freedom and space for their own life choices.

Olena Yanevych, the president of the association 'Ukraine Together' in Padua, Italy, explains the rise of the rotational phenomenon and its advantages for Ukrainian

women; she considers that rotations are actually very interesting, especially if they occur within the same migrant family. She stresses that a woman who goes back home after 3 months in Italy does not need to send money; instead she can take it herself, thus gaining more control over it. In addition, the woman does not lose contact with her husband and children and can look after them not by phone but directly. Further, she can participate in major family events, such as weddings and funerals – something that would have been more difficult under the old, less mobile, paradigm. However, I argue that this new mobility paradigm does not aim to integrate female migrants into the host society but, rather, prepares their return to Ukraine. Olena stresses that the rotational system is so popular that some older women (aged 70 years and above) who had worked as caretakers in Italy for many years and who already hold an Italian permanent residence permit, take their 'turn' as scheduled a year in advance. This perfectly confirms Solari's (2017) point, when she suggested that the reason why migrant mothers consent to such a schedule is not only their altruistic desire to help their children's family. In a situation where they were being doubly marginalised (2018), grandmothers opened up new opportunities for themselves to reclaim their social status and importance in the family – through the re-distribution of care inside the family. In this case, the younger woman receives financial (but not only) help from her mother's remittances and the older woman gains new social dividends in the form of increased personal agency and authority in her extended family. These middle-aged women, who make up the largest group of Ukrainian women in Italy, become simultaneously the main 'breadwinners' and their daughters' 'partners' in the transnational Ukrainian family.

3.8 Conclusions

The case of Ukrainian long-term female migration to Italy illustrates the commodification of care taking place both in the employer's family in the country of destination and in their own family back in the home country. Ukrainian women, who initially envisioned their migration to Italy exclusively as a temporary work project, have now found in the rotational system a new way to maintain their presence at the both ends of the transnational space which their migration created. Having access to more private resources – such as personal savings – and benefitting from a slightly stronger institutional framework (increased legalisation, better integration in Italy and improved air and land transportation), they optimise their work schedules in Italy, taking 3- or 4-month turns instead of going abroad for the whole year. They thereby not only continue to play in both fields but also deal better with the formal and private challenges emanating from their long presence in the transnational space and from their long absence from their families back in Ukraine. I have argued that these women circulate care not only within the same nation – Italy – but also sometimes even within the same family, when mothers replace daughters (and the opposite) in 'breadwinner' or 'care provider' roles, thus circulating care transnationally.

Even though the circulation of care in the transnational Ukrainian family still mostly takes place in the framework of a mother-and-daughter contract, this chapter has presented other cases wherein migrant women are substituted by other female relatives within the extended family or other unrelated female migrants in Italy. The rationale behind these shifts is embedded in the old intergenerational contract within the families and the old gender norms which continue shaping public discourse in the country. One of the main prerequisites for this is that migrant women continue to see themselves as solely responsible for the care and domestic work at home even after many years spent abroad earning a living for their families in Ukraine. They successfully continue to exploit the *Berehynia* image to justify the moral correctness of their migration decision by emphasising the symbolic and material contributions they have made to their children's (and their families') welfare and wellbeing. As some cases have demonstrated, they also manage to convert this burden of responsibility into new forms of capital and to increase their agency in the transnational space between the two countries.

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Chapter 4
From Familial Pressure to Seeking One's Fortune: Chinese International Students' Search for Geographical and Social Mobility as a Response to Societal and Familial Pressures

Alexander Gamst Page

4.1 Introduction

In many ways, post-1978 China is unrecognisable compared to how it was under Mao. The transition to a market economy, its cultural opening to the outside world and a multitude of societal reforms made for a sharp generational divide between those who grew up in the pre- reform era and those in the post-reform period (Clark 2012; Dychwald 2018; Fong 2004). The latter cohort has been raised in a country with near-constant economic growth, has been exposed to international media and has not experienced the political and societal turmoil that their parents lived through (see Chan, Madsen and Unger 1984; Clark 2012). Particularly in urban areas where the one-child policy was more easily enforced (Kane and Choi 1999), most Chinese youth are single children. This may place the child in a precarious position as the social convention is that he or she supports the parent in old age (Fong 2016). This leads to a situation where this one child grows up with the totality of his or her parent's hopes resting on them (Fong 2004). In addition, the official narrative of ever-increasing prosperity coupled with exposure to images from Western countries, means that young people also tend to have built up high expectations as to their own lifestyles (Dychwald 2018; Fong 2011). However, it soon becomes apparent that only an extreme minority, such as those with well-connected parents or with outstanding academic records, will realistically be able to achieve the socio-economic lifestyles envisioned. Of course, some achieve this through entrepreneurism – colloquially termed 'jumping into the ocean' – but this is risky and here, too, only a few are able to achieve significant socio-economic advancement. For many, educational sojourns abroad are seen as an alternative route to social mobility (Fong 2011; Page 2019b). This view is often shared by the students' parents, who can therefore go to

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great lengths to pay for these sojourns. Some take up loans from friends and family, empty their savings or even sell their homes in order to fund their children's studies. While they have high expectations that their children will become successful, the convention of familial eldercare acts as a ticking clock. As their parents age, the sojourning youth seeking their fortune know that they are expected to eventually return.

This chapter is based on an ethnographic study of a group of Chinese international students in Norway. The topics addressed here are, first, what motivated them to travel, second, their aspirations for the future and third, how they envision their present experiences as facilitating this future. Norway is a welfare state and, much like in other such countries, there has been significant public discourse regarding migrants' perceived abuse of welfare services. However, the Chinese youth studied here seem to be focused on a different aspect of Western European welfare – namely substantive freedom. This is a central part of the work of Sen (1999), who measured a country's development by the freedom available to its inhabitants. Many of the participants stated freedom of choice as a driving reason for leaving China, suggesting that, had they remained, they would have been stuck in a middle- to lower-middle-class situation with no realistic pathway to the lifestyle they envisioned for themselves. Thus, the potential outcome of migration the most ardently anticipated is increased control over one's own life trajectory. A belief was repeatedly expressed that a degree from a Western country would be more internationally transferable than one from a Chinese university. In addition, many also stated that studying abroad would allow them to cultivate cross-cultural communicative skills. Thus, through studying in a country that is developed in terms of its substantive freedom, they seek to gain a wider range of possibilities than they would otherwise have had, recreating themselves from locally situated people with fixed life trajectories, to globally and socially mobile people. In this way, their migration may be seen as intended to provide the ability to shape their life courses through individual agency.

While the participants are focused on their own aspirations, many also explain that the well-being and future needs of the parents also weigh on their minds. The knowledge of the financial sacrifices of their families is a source of pressure, as is the knowledge that a deterioration of the parents' health might necessitate an early return. Thus, while they present an image of an ideal future self as a global citizen, able to travel anywhere and do anything, they are tethered to China through familial obligations. In a manner of speaking, the students' welfare needs may one day have to be weighed against those of their parents – a dilemma that some of the participants are already dreading. However, even those who expect this call to come sooner rather than later believe that they will retain the mobility they have earned. Thus, the mobility that these students seem to wish to cultivate for themselves may be seen as the *potential* for movement. They envision that, even should their familial situations force them to return, their Western degree and cross-cultural skills will allow them to activate their global lifestyles when their life-circumstances permit.

4.2 The Post-1980s Generation or *bālínghòu*

The concept of generational shifts needs clarification, as births take place continuously and any delineation will unavoidably carry ambiguity (Spitzer 1973). Mannheim (1923) is often thought of as having provided the seminal work on generations or cohorts within the social sciences. A person's age determines his or her cultural location, frames of reference and social and intellectual currents that formed them. Members of a given generation will here be seen as 'those people within a delineated population who experience the same significant event within a given period of time' (Pilcher 1994, 483) as '[c]ontemporaneity becomes sociologically significant only when it also involves "participation in the same social and historical circumstances"' (1994, 490). In the case of societies experiencing rapid cultural change, it seems reasonable that this will create similar, if not stronger, generational differences than formative events. In both these senses, there is a significant gap between those who grew up in China's pre-reform era and those born after it. The former experienced famine, political instability and an almost Orwellian demand for political orthodoxy. Deng's premiership, following the death of Mao, was marked by a series of reforms that led to rapid economic growth. Because of this, the children born thereafter grew up in a very different country to their parents. While there are numerous terms used for them both within and outside China, such as the 'me generation', the 'Y generation' or the 'little emperors', here the term *bālínghòu*, which translates as the 'post-1980s generation' will be used. It is common in China to speak of children born in each decade in separate terms, differentiating the post-1980s from the post-1990s, post-2000s, etc. However, I argue here that the marked generational shift we see around 1980 makes *bālínghòu* a fitting synecdoche. With the economic reforms introduced in 1978 and the one-child policy in 1979, it is in those born from 1980 onwards that the most marked generational shift may be observed. They have grown up with near-constant economic growth and have not experienced the hardships and turbulence that their parents lived through.

The parents of the *bālínghòu*, many of whom missed out on tertiary schooling themselves, tend to be very intent on their offspring's higher education. It has become usual for urban parents to expect their children to go to a good university and to invest time and resources into securing this outcome (Liu 2015). Access to higher education for school leavers has risen dramatically since the reform era, from 0.26 per cent in 1949 to 1.55 per cent in 1978 and 42.7 per cent in 2016 (Sun 2017). This means that going to university has shifted from a privilege reserved for but a few to being the norm among urban youth. The one-child policy also plays a role in the parents' expectations, as it allows the parents' resources to be concentrated onto a single child. This has also alleviated the gender imbalance in formal education, as the limit on the number of offspring prevents sons being prioritised over daughters (Fong 2002; Lee 2012).

As is implied by terms such as the 'me-generation', those born after the 1980s are seen as representing an unfortunate break with previous generations. They are

viewed as having lost their forebears' ability to *chīkǔ* or "eat bitterness" – meaning to stoically endure hardship (Dychwald 2018). Many older Chinese lament what they see as a rising materialism and individualism among the *bālínghòu* (Chan, Zhang and Wang 2006; Shi et al. 2016). One of the typical culprits blamed for this is the high level of parental investment and attention. Indeed, compared to Europeans, Chinese youth tend to be quite dependant on their parents and are less accustomed to taking care of themselves (Stanat 2005).

To think of the *bālínghòu* as being spoiled would be quite unfair, though, as the familial pressures many experience are considerable. While the parents are able to invest much of their time and resources in their single offspring, their expectations are similarly concentrated (Fong 2004). The convention of familial eldercare is one of the reasons why parents are so invested in their children's education, as they will one day be dependent on them (Fong 2016). While private enterprise may be lucrative, it is also risky; education is thus seen as the most reliable road to economic stability. Young people often feel a great deal of pressure to become 'successful', both economically and in terms of self-realisation. All these factors, combined with rapid urbanisation and economic development, have led to intense competition for university admission. While the number of available places has expanded, it has increased nowhere near enough to match growing demand. Even a mediocre student often spends upwards of 10 hours a day studying, leading some to opine that they have given up their youth in exchange for China's economic rise (Dychwald 2018).

4.3 Sen's Development as Freedom

Economic development is central to many of the major theoretical frameworks of migration. The neoclassical model (e.g. Ravenstein 1895), the New Economics of Migration (Stark 1978) and the World Systems Theory (Wallerstein 1974) to name a few, all focus on the idea that people move for primarily economic reasons. Indeed, this is not illogical as the wish to escape poverty seems to be a central cause of migration. The argument of this chapter also fits within this framework as long as the view of what constitutes poverty is broadened. While most of the major theories of migration take a macroscopic economic view, Amartya Sen (1999) views development on an individual level. He argues that there are three metrics that are important in gauging economic development, these being political freedom, freedom of choice and economic freedom. He defines poverty as the lack of any or all of these metrics. Thus, even someone with an income above the poverty line would still be considered poor if this individual is lacking political freedom and/or freedom of choice. These three measures comprise what are variously known as 'substantive freedoms' or 'human capabilities'. These are, in Sen's analysis, central to development. They serve both as a measure of development and as a driver of it, as it is often possible to access one type of freedom through another or, in Bourdieu's (1986) terms, transfer capital from one form to another. However, this is not to say that

access to one form may always provide access to the others. In fact, Sen (1988, 1999) suggests that one reason for this extended view of poverty is that a lack of political freedom and freedom of choice may limit human capability and development in a way which would be masked should one only use strictly economic measures.

4.4 Method and Participants

The focus of this chapter is to explore the juxtaposition between the global ambitions of a group of Chinese students enrolled at a Norwegian university (hereafter IUN) and the way in which they are tied to the sending communities by their filial responsibilities. IUN is situated in a medium-sized university town in Norway and is undergoing a push for the diversification of both students and staff. This began in the 1990s with the stated goal of making the university 'internationally excellent'. During this internationalisation initiative, the student body has become significantly more diverse, at least within certain disciplines such as engineering and computer science. While the majority of international students at IUN are from various European countries, there are a significant number of 'non-Western' students as well, the Chinese being the largest group. This study was conducted from September 2012 to April 2014 and was conceived as an inquiry into the experiences of the Chinese students enrolled at IUN. It was an open-ended ethnographic study focusing on many aspects of the students' lives. As such, the findings are too many and diverse to fit in a single paper and some have been published elsewhere (Page 2019a, b). The study was conducted using both participant observation and semi-structured interviews. The group-based nature of the field setting compared to the one-to-one interviews meant that different types of data emerged in the two settings – this chapter is mostly based on the interviews. The research questions concern (a) what motivates their sojourn, (b) their aspirations for the future and (c) how their migration would facilitate this.

At the time of this study, approximately 100 Chinese students were enrolling at IUN each year. Most of these were on Master's programmes in engineering, material science and IT. It is well-documented that, when there are sufficient numbers, international students tend to cluster into co-national groupings (Taha and Cox 2016). The Chinese, being one of the largest national groupings at IUN, were numerous enough to comprise several cliques and milieus and it is on one of these that the current study is based. These milieus have fluid boundaries and rotating memberships as senior members graduate and new ones enrol. As such, it is hard to enumerate how large this group is, although for the purposes of this chapter it can be said to consist of approximately 40 individuals.

All the participants quoted herein were in Norway on student visas and were engaged on programmes of at least one year's duration and most commonly two. The average participant was a member of China's urban middle class from a coastal city, born in the late 1980s and an only child. For most, it was their first extended

stay outside China and, for some, their first ever trip abroad. The group was fairly evenly balanced in terms of gender. In order to minimise the participants' inconvenience, interviews were held where and when they considered it the most convenient, with most taking place on campus after lectures. While some Chinese and Norwegian was used, the primary language was English. The interviews were recorded with the participants' consent and all names used herein are randomly selected pseudonyms.

4.5 Embodying Modernity Through Global Capital

As already mentioned, the *bālínghòu* participating in this study are in Norway on temporary visas and, as such, would be thought of by many as sojourners. However, as the duration of their sojourns exceeds a year, they also meet most scholars' criteria to be considered migrants. Migration is defined in many ways but, in a broader sense, may be seen as the crossing of a political, geographic or administrative boundary with the intention of remaining for a certain amount of time – 1 year being a typical stipulation (Castles, de Haas and Miller 2014). The crossing of a boundary signifies the movement from one type of place to another and thus involves movement from a sending to a receiving region. One common way to understand migration is as a result of a calculation between the factors that push someone to leave one place and those that draw them to another (e.g. Moon 1995; Ravenstein 1895; Zhang et al. 2012). From this perspective, asking why the *bālínghòu* youth in this study embarked on their educational travels may be seen as a two-part question: Why did they leave China and why did they go to Norway?

4.5.1 Reasons for Leaving China

For many of the participants, their reason for migrating was more marked by the factors that pushed them to leave China rather than those that drew them to Norway. A surprisingly small proportion of the research on Chinese international students deals with the question of why they leave, focusing more on their reasons for choosing the receiving country (e.g. Ahmad and Hussain 2017; Bodycott 2009; Yang 2007) and their likelihood of staying (e.g. Alberts and Hazen 2005; Han et al. 2015). One large-scale study that does deal with push factors is that of Fong (2011) whose findings in this regard also fit well with those of this chapter. The participants of this study echoed those in Fong's work in that they expressed a variety of reasons for leaving China, some of which were unique to the individual student. However, there was a recurrent expression that migration would allow them more control over what would otherwise have been relatively fixed life courses, as Yao, a 25-year-old male student explained:

> I worry that, in China, I have no choice in my life. I would, like, do *this* job, or *that* job. I live *here*, get married *then* to *this* person… I think that you, in these countries, can chose your own future.

As previously intimated, the intense competition in China means that only the very top academic performers would have their choice of university and the others would have to take whatever studies would give the best prospects for employment. Thus, they would be required to maximise the benefits of each potential area of study and choose the most materially beneficial one. In a sense, the choice would be made for them, leading to the feeling of being railroaded. Yao's statement above is an indication that such feelings are also prominent among the participants of this study, sentiments echoed by others such as Xuegang (26, m):

> In China, I can't take the Master's I want. I have to see what I can get into, what will give me a job. You can't just… study the thing your heart says, or your dream. With these results, there may be only one thing you can do.

Xuegang and Yao, as well as many of their peers, had begun their studies in China. They had enrolled on the best programme that they could get onto with the results they had from their higher-education entrance exams (*Gāokǎo*). The point at which the students decided to study abroad varied greatly. One had made up her mind to study elsewhere immediately after receiving her *Gāokǎo*. For her BA in China, rather than focusing on her employment prospects, she had attempted to maximise her chances of being accepted on a foreign MA programme. Others had begun their studies with the intention of completing them in China but had realised that the course they had chosen was not for them. They had applied abroad because of a belief that this would allow them access to postgraduate studies further removed from their BAs and/or that the degrees they received would make them more desirable on the job market and thus give them access to a wider field of choice. One indication that leaving the sending country was more important than the choice of receiving country was that many of the students, including Xuegang and Yao, had merely sent out applications to any foreign university they could, in the hope of being accepted in at least one.

In Sen's (1988) terms, we can argue that the students were fleeing poverty in the sense of freedom of choice. Such freedom has both an intrinsic value in itself and an instrumental value in allowing access to other 'commodities'. In this specific case, what they would be accessing by achieving greater control over their academic and career trajectories could be such things as higher pay or greater job satisfaction. However, as I demonstrate more clearly later, the students seemed more concerned with freedom of choice for its intrinsic value, as its mere possession becomes an important factor in their identity construction.

4.5.2 Why IUN?

We saw above that many of the participants were primarily concerned with leaving China and that the actual destination was secondary. Those following this strategy might have preferred English-speaking countries as this would make communication easier. However, Norwegian universities were also an attractive alternative as there were no application or tuition fees at the time. The absence of the former was especially important to those employing a scattershot approach to application. Among the participants of this study, while their reasons for leaving China were very much in line with prior studies, their reasons for doing studying at IUN were more idiosyncratic.

For some of the scattershot applicants, IUN had merely been the first and/or best university which had accepted them. Others had sought IUN specifically because of their fields of interest. One student, for instance, was researching a technique of underwater pipeline construction in which IUN has special competence. A few students had even known of particular professors under whom they wished to study. One of these students, Shi, had actually met her future supervisor when he had been giving a talk in Shanghai. The two had struck up a conversation, and it was the professor himself who had told Shi that the IUN might be of interest for her postgraduate work.

Two of the participants, Chan and Dewei, had personal reasons for applying to IUN. Chan had a girlfriend who was studying elsewhere in Norway and entering on a student visa was Chan's best option of being close to her. He had done some research and found that IUN was the closest institution to her that had a Master's programme which might be suitable for him. The two took the train to visit each other over the long weekends and the shorter breaks where visiting their families in China would be impractical. Dewei, on the other hand, had previously held an internship with a company in Europe and had taken the opportunity to travel within the Schengen area. Among the countries he visited was Norway and he had fallen in love with the place. For him, applying to IUN had been primarily about returning to Norway and about attaining formal qualifications that would increase his chances of being able to remain.

4.5.3 The Opening Up of Life Trajectories

As we have seen, the students expressed a belief that staying in China would mean constricting their life courses, that the progression of both their careers and their social lives would be more or less determined by their relatively limited options. Many of the students said that this was one of their main reasons for studying abroad – that this would give them more control over their lives by opening up a larger number of potential avenues (Page 2019a). These avenues were primarily concerned with access to more choices in the place of residence and the career. For

the former, several participants suggested that a Chinese degree would primarily be of interest within China, whereas a degree from a Western country would be far more internationally transferable. Holding such a degree, it was said, would make it easier to get visas and residency permits in whatever place they might wish to go. One student, 28-year-old Ni, also intimated that she might wish to continue studying in the US and that she would be more likely to gain access based on a degree from IUN than from the Chinese university where she had received her BA. However, she had not made up her mind yet. Rather than working towards the goal of further education, she wanted to open up the greatest possible range of options.

> One of the reasons why I came here is that I want to be free to move around the world. If I study in Norway, I have more opportunities. Even if I cannot get a job in Norway, it is easier to apply for other universities in other places in the world. […] Also, because, although I think even China is developing very fast now, I could not see my career in China. Not yet here. I still cannot see my future now but I think that, if I study abroad and I move, I will have more possibilities and opportunities.

Both the terms that Ni employed – possibility and opportunity – were very much recurrent, appearing in the majority of interviews. Ni notes that, although she does not know exactly what she wants to do, she wants the ability to create options for herself. In fact, very few of the participants had concrete plans for their future after graduation. Rather than being an entry point into a specific career or discipline, a Western degree was presented as a commodity granting general access to a type cosmopolitan, globally mobile lifestyle. In fact, many of the students placed a premium on both geographic and social mobility and seemed to aspire to a near-nomadic lifestyle.

> I'd like to, maybe, not stay in one place, may be stay in some other locations. It's more fun (…) [M]oving different places and working different positions, maybe, like, can make better opportunities for me (Chunlei, 27, f).

> I really do not have any real plan. I mean, no real plan on what job I want, or where. Maybe, like, work three months in one position, then move to another place and another position (...) you can gain a lot of different experiences (Lanfen, 28, m).

From this it seems as though the lack of a plan or, rather, the lack of the obligation to have a fixed life course, is itself a desirable quality. From the above quotes, we can infer that the ideal future to which these youth are aspiring is a semi-nomadic existence where more thought is given to the potentiality for mobility than to where this mobility might lead.

There are two factors to which the students attribute this mobility, one being their formal qualifications, the other being informal cross-cultural communicative skills. Of course, the idea that higher education may bring increased mobility is quite true. Many countries have relaxed immigration policies for highly skilled individuals (Wright 2015) and such migrants also tend to face less stigmatisation from the majority society (Hainmueller and Hopkins 2015). Whether a degree from a not-particularly-well-known Norwegian university is more internationally transferrable than one from a Chinese university is harder to determine but many of the students expressed a belief – or maybe more of an assumption – that this would be the case.

One possible reason why this might be so is that study at a foreign university would allow the *bālínghòu* to gain exposure to other cultures and help them to develop cross-cultural communicative skills (Fong 2011; Gu and Schweisfurth 2015). These benefits would partly consist of English-language skills but would also be seen more ephemerally as an acclimatisation to difference generally. These factors, the formal and the informal, were seen as together conferring global and social mobility, allowing the student to go anywhere and do anything.

In the attainment of global and social mobility we see the intrinsic value placed on Sen's (1988, 1999) freedom of choice. It has been argued elsewhere that the ways in which these students express themselves suggest that their sojourns are more about identity work than about formal qualifications (Page 2019b). While travel and job mobility are each valuable in themselves, the vagueness with which the participants speak of both are notable. Very little emphasis was given to any specific jobs that they would like to do but focused, rather, on the movement from one to the other. The same was true of places of residence. Dewei's wish to stay in Norway and Ni's possible studies in the US were the only times when specific countries of residence were mentioned. Here, too, what was presented as a valuable commodity was the movement *between* undefined hypothetical places. This is consistent with the emergent middle-class consumer culture in China, whereby international travel is among the prime vectors of identity construction (Elfick 2011). Thus, it may be that the reason for the lack of specificity is that the specifics themselves are unimportant. Rather than the freedom to do any given thing, the participants seek to become the kind of empowered people who have freedom of choice in a more general sense.

4.5.4 Parental Pressures

One of the dominant research trends on international students follows what is sometimes termed the deficit model (Montgomery 2010). The defining trait of this model is its focus around what is *lacking* in the students' life, such as money or social interaction (Bochner, McLeod and Lin 1977; Pritchard and Skinner 2002; Ward and Kennedy 1993; Yu and Moskal 2018). While it may be argued that this perspective has been overemphasised (Page and Chahboun 2019), it is not without basis. International students typically live under pressure from multiple sources, such as social isolation, uncertainty and having to adjust to an unfamiliar educational system. While this is also the case for the participants of the current study, the general hardships of the international student experience is outside the scope of this chapter. However, one particular source of pressure is very relevant and that is parental expectations. These generally take two forms related to bidirectional support within

the parent–child relationship.[1] That is to say, at the time of study, the parents were responsible for the children's economic welfare needs but social norms dictate that this state of affairs would 1 day be inverted.

During their studies, economic support was flowing primarily from the parents to the children, a fact that weighed on the minds of some of the students. We previously saw how one factor making Norway attractive was the lack of tuition fees. There are also public subsidies, grants and stipends, some of which would have been available to Chinese students at the time of this study. However, day-to-day life in Norway is expensive and even recipients of full student stipends live well below the poverty line. The majority of my participants were supported, either wholly or in part, by their parents; in many cases, this would have been a major expense. The GDP difference between China and Norway is large enough that a typical Chinese salary does not go far. Norway has an unusually high cost of living even for a European country, leading some parents to go to extreme lengths to finance the children's sojourns. Those parents with extensive networks of friends and family were in a position to borrow what they needed, spreading it out over a large number of people – a few hundred here, a few thousand there. Other parents had been central urban residents during the economic reforms and had been given the opportunity to buy their homes from the government at a relatively low rate. These people were now in a position to sell their homes at much higher market rate and move to cheaper accommodation. While these major sacrifices were the exception rather than the rule, several of the students explicitly noted that their sojourns were an economic hardship for their parents.

More common among the participants was stress stemming from the awareness that they were eventually expected to become caregivers themselves. In this way, the decision as to whether or not to return to China became modulated by the welfare needs of the parents. This responsibility would be wholly on the participants' shoulders, due to the lack of subsidised eldercare in China and the fact that all of the students interviewed were only children. In fact, when asked whether or not they intended to return, this was taken as such a natural state of affairs that many treated the question itself as ridiculous. 'Of course!' was the most common response, sometimes followed by a slightly condescending explanation of the one-child policy and its implications for parental care. This expectation certainly seemed to be taken seriously by the participants but it should not be taken for granted that all would end up going home to their parents. While most expressed an intention to return to China and none explicitly said that they intended not to, there were some who seemed unsure.

If the primary goal of the children is the attainment of freedom of choice for its intrinsic value, this is unlikely to be the priority of the parents. Being potentially financially dependent on their offspring and having invested financially in their education, they are more likely to focus on concrete and pragmatic concerns. They will want to know that their children will be in a sufficiently stable economic position to

[1] For more information on the bidirectional exchange of care, as well as the older generation's perspective, see Chap. 2 in this volume by Zhao and Huang.

take care of them. While they were no doubt investing in their children's happiness, they were also investing in their own futures. One 25-year-old male student, Liao, remarks on the sometimes incompatible goals of the two generations.

> I want to see the world. If I go back to China, I don't know when I'll be able to leave again, so I, like, want opportunities. My parents just ask how much money I will make and what my chances are of getting a job with such a degree.

Remembering the importance placed by the participants on mobility, we can infer from this that Liao is expressing a concern here with constructing a mobile identity. His parents, on the other hand, want to know the likelihood of his getting a job and how much this job is likely to pay. As with their offspring, agency is likely to play a role in the experiences of the parents as well. They are, as has been stated, dependent on their children and it is no doubt stressful to see the letter engaged in a costly pursuit that might or might not pay off. It is also no doubt a source of stress to them that their children are so far away. At the same time, some students have noted that their parents are wary of putting undue pressure on their offspring, as Zhelan (24, f) shows:

> I call my parents as often as I can, but… many times it is difficult. They always ask me when I'm coming back to China, but without asking, you know? Like, maybe, they don't directly ask, because they know I have lot of work and they don't want to pressure me, but they'll maybe say, like, 'Someone we know is getting married at this time, and they wonder whether you will be coming. We couldn't say because we don't know when you're coming home', something like that.

From these statements, we see an implied dilemma for Zhelan's parents. They want to know when she will return but seem not to want to ask directly. Zhelan herself believes that they do not ask directly because they do not want to cause her stress and harm her academic progress. Instead, they find a way to inquire indirectly by referencing an event happening at some point in the future and saying that someone else – not them – wants to know whether Zhelan will be able to attend. However, we can see from the statement that she experiences this as a source of pressure. She further explains how draining this is, despite or perhaps because, she believes that her parents are less concerned about *when* she will come home but more about whether she will actually do so at all. Such nervousness appears to have some justification, as not everyone was equally sure about returning, as two female students, Chunlei, 27 and Lin, 24, explain:

> I thought I would be returning to China immediately, maybe my parents need me. But now, I don't know, I like Norway. It's quite cold, but people are nice. It's very beautiful, with the mountains.

> I don't know. I struggled over whether or not to go back. I'm worried my parents might need me. But even if I do go back, the experience from other countries would be valuable (…). Lots of good experience here. There are a lot of things Chinese people should learn.

Regardless of whether or not these two would eventually return, it is clear that the perceived obligation to the parents was palpable and that staying abroad would be felt as neglecting it. The obligation probably has multiple sources – such as the

children's love for their parents, the feeling that caregiving is socially expected of them and the tacit urge to reciprocate the care and resources the students have been given. However, honouring this obligation would be a severe interruption to the life trajectories the youth were imagining for themselves. Here we see again the clash between the younger generation's emphasis on freedom of choice and their elders' wish for freedom from material and economic hardship. While the members of both generations imagined that educational sojourns could provide welfare in the sense of freeing them from poverty, we see that the specific *type* of poverty they wish to escape from may be hard to reconcile. At first glance, remaining abroad and applying for family reunion may seem like a viable compromise. However, it must be remembered that the emphasis was on freedom of movement – on building a cosmopolitan self through the potential mobility between geographical and social spaces – and caring that for ageing parents would constrain this wherever it would eventually be carried out.

4.6 Conclusions

This chapter has explored the motives behind young Chinese people's migration to a welfare state and the inner conflicts that this migration reveals. In a sense, this conflict may be considered to be somewhere between dynamism and stability, as the students seek to utilise their sojourns to recreate themselves as people whose sense of self is bound to the potential to alter their situation, seemingly on a whim. However, they are bound by filial obligations to people who are more invested in the certainty that their material needs will be met. While the *bālínghòu* in this study wished to travel to a welfare state and their parents largely supported this wish, the two cohorts had very different ideas as to what type of welfare was the most important. For the younger, it was the freedom of choice; for the older it was income security. Thus, while both the parents and the youth themselves wished for the sojourn to be a success, this was measured differently. Far from wishing their offspring to be globetrotting cosmopolites, the parents were far more likely to be concerned with practical considerations such as the likelihood of employment and projected earnings.

On the one hand, the *bālínghòu* themselves seemed to engage in such stays abroad primarily as a project of self-development. For them, China is juxtaposed with the West in terms of the substantive freedom available to its residents. While China is presented as a place where their circumstances would determine their life courses, a European degree would allow the holders to affect these courses through their own agency. The end goal was not to achieve any given situation but, rather, a high level of global and social *mobility*. Any concrete destination point in the life trajectory seemed intentionally left open, so that the indefatigability itself becomes a value in its own right. This can be interpreted as a transcendence of regional belonging to a more pan-global disembeddedness.

This stands in contrast to the fact that they are tied to their sending communities by their parents. These latter are currently patrons financing the sojourns but they can at some point become dependants in need of support themselves. Indeed, it is possible that the fact that the *bālínghòu* have obligations waiting for them in China may be part of the reason for the fluid trajectories. When they know that they will be required to return to their parents at some point and may need to care for them for many years, embedding themselves too deeply in a new community becomes more problematic. This would either mean uprooting themselves at a later date or abandoning their parents.

These differing motivations may have a number of causes, one of which is the different societies in which these two generations grew up. The *bālínghòu* were raised in a rapidly modernising society with a powerfully expanding economy. Being only children, they never had to compete with siblings for their parents' attention; however, they also had no one to help them to shoulder the responsibility for them at a later life stage. The expectations they have for their own lives as well as those which the parents place on them are both extraordinary. One might say that they are raised with the life expectations of modern people in a modern*ising* China. Substantive freedom in terms of economic and lifestyle agency is very important to them, as is the ability to construct identity through their own choices.

The parents, however, have seen and/or experienced privation on a scale that their children are unlikely to ever know. The oldest of them have lived thorough the years following the great leap forward, which saw the deadliest famine in recorded history, with a death toll in the tens of millions (Dikötter 2010; Roberts 2011). As people who have not learned to take material necessities for granted, they are more likely to be more pragmatic in such matters. In addition, the more agency their children have, the less control the parents have over them; equally, the more the children become invested in their lives abroad, the less likely they are to return.

This chapter has concerned thoughts, dreams, imaginations and desires. It has not been my goal to fact-check each of the assumptions made, nor to follow up on whether the students truly did return to their parents when and if the call came. Such questions might be the subject of a future study when the *bālínghòu* participants have grown older and seen how their imaginations fit with the cold, hard reality. Such a future study might also shed more light on the outcome of the clash between the divergent substantive freedom sought by two groups who are intimately linked yet separated by a deep generational divide.

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Chapter 5
‘He Has a Better Chance Here, So We Stay’. Children’s Education and Parental Migration Decisions

Magdalena Ślusarczyk and Agnieszka Małek

5.1 Introduction

In traditional terms, welfare has been defined as ‘a set of entitlements and provision provided by the state or guaranteed by it’ (Sciortino 2004, 113) or, more broadly, as a ‘sphere of activities of the state and other public bodies and social forces that is involved in the development of living conditions of people and interpersonal relations (especially in the living and working environment)’ (Rajkiewicz 1998, 17). These definitions primarily highlight the role of state authorities and public institutions as key entities regarding the provision of social protection. Today, the role of other entities has been on the increase – that of market or non-governmental organisations – which is reflected in terms such as welfare pluralism, welfare mix or multi-sectoral social protection. In the welfare-mix model, based on integrating a number of different entities, the state, the markets and the family are seen as crucial sources of responding to and managing social risks (Powell and Barrientos 2004, 85–86). This approach is useful for understanding the immigrants’ choices and decisions, which are the focus of our chapter. The achievement of basic social protection for citizens has resulted in the appearance of new expectations of the state’s assignments and the expansion of the catalogue of benefits it provides (Głąbicka 2001). Education has become one such area; though it ‘is not always recognised as part of the welfare state’s policy package, it is, no less than other public programmes, recognised as a core entitlement in most Western societies’ (Hega and Hokenmaier 2002, 2). The increased importance of education as a factor determining life chances has undoubtedly played a major role in this outcome. The purpose of this chapter is to bring education under the umbrella of the analysis of welfare protection for migrant families. We assume that, when making decisions on migration and/or its continuation, individuals and families act independently but within external

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considerations which include, among others, the social protection offered by the state and society of their destination (Grabowska-Lusińska 2012, 13). We demonstrate that the inclusive social system of Norway does not have to be a key pull factor at the moment of emigration; however, it is of importance when the decision is made to transform a migration project from a temporary one into settlement or, conversely, a return to the country of origin. In the case of families with children, assessment of the educational system and educational opportunities in the countries of destination as compared to those of the country of origin is one of the key issues. This is because a decision to send a child to a Norwegian school means a decision in favour of a longer stay in Norway or even settlement (Gmaj 2016; Huang et al. 2015). It is also interesting to consider whether and to what extent the school contributes to the process of integration of children in peer groups on the one hand and of their parents through engagement in the life of the school and their subsequent contact with other families on the other. Comparing the Polish and Norwegian educational systems, it is the latter that puts more emphasis on the active involvement of parents at school. This is different from the Polish context, which justifies our inquiries into how Polish parents in Norway respond to such expectations and whether ideas and practices from the community of origin become transferred, negotiated or transformed or, alternatively, whether Norwegian patterns are accepted.

In Polish migration studies the issues of welfare and immigration have been recognised but only to a small degree. Migration decisions have been mainly considered through the prism of the labour market and the role and importance of social networks, whereas the welfare dimension has only been identified as a possible pull factor.[1] The system of social care has been an object of analysis primarily in relation to two-way intergenerational transfers relating to social protection (Krzyżowski 2013; Krzyżowski and Mucha 2014) and in research into female migrants who undertook employment in domestic and care service, especially in countries in which state institutional support and financial expenditure for the care of elderly and dependent persons are limited (Małek 2012). In this chapter, we focus on another aspect of welfare – namely its educational dimension. We are especially interested in the way in which migrant parents perceive the educational concept of the Norwegian state. We examine the situations in which they develop upward strategies of pragmatic (and sometimes instrumental) use of educational opportunities related to life chances for their children. It is also important to mention that migrant parents, living in a transnational space, assess all the possibilities, resources and their own activities through two prisms: their lives in Norway and the relationships which they maintain with their country of origin – in this case, Poland.

[1] By way of example, Joanna Napierała (2008, 36) anticipated that, with increasing penetration of the Norwegian labour market by Polish employees, 'Norwegian pay and social care' would be the key pull factors.

5.2 Welfare and Migration

Until now, research into the impact of the welfare state on migration decisions and strategies has mostly been based on an analysis of statistical data (the examination of the structure of social expenditure) and carried out from a macro-social and macro-economic perspective (Blank 1988; Borjas 1999; Giulietti and Wahba 2012). It has primarily focused on the issue of migrants using the social benefits available in the countries of destination and on answering the question of whether social packages act as 'welfare magnets' or whether migrants follow the strategy of 'welfare shopping' (Borjas 1999; Péridy 2006). The research results are not unequivocal. Borjas (1999), who authored one of the best-known papers on the topic, argued that the expanded welfare state impacted on the skill composition of migrants – attracting low-skilled migrants – and that it acted as a buffer protecting against turmoil on the labour market. Immigrants are perceived as calculating individuals, whose choice of where to migrate to are guided by income-maximising behaviour (Borjas 1999, 634–635). For example, analysis of internal migration in the United States shows that traditionally generous states with extensive social support systems, such as California, New York and Wisconsin, are magnets drawing persons with low resources to secure comparatively higher benefits (Levine and Zimmerman 1999). Razin and Wahba (2011, 28) criticised such simple explanations, stressing that the skill composition of immigrants depended also on such factors as the policy regime or on access to migrant networks, since these lower the costs of migration (Giulietti and Wahba 2012). Razin and Wahba (2011) argued that the welfare magnet hypothesis is possible in free-migration regimes, where the generous systems of benefits mostly attract unskilled immigrants. In turn, research done by De Giorgi and Pellizzari (2009) into European immigration prior to the extension of the European Union in 2004 proved that the level of social protection in the receiving state had a measurable but limited impact on migration decisions, though these were certainly stronger in the case of non-qualified migrants from the new member states.

Other directions of research into welfare and migration related to the consequences of the lack of migrants' access to social protection (Van Ginneken 2013), integration, immigration and welfare state policies (Brochmann and Hagelund 2012) and the ways in which welfare regimes interacted with migration regimes (Sciortino 2004). Though the research area has been growing with the expanding notion of welfare, there is still a shortage of papers that consider the positioning of individuals in a transnational social field and use a quality-based approach emphasising the practices and judgements followed by the migrants themselves.

Classical models of welfare states (Esping-Andersen 1990, 2005; Titmuss 1974) are based on an indication of the institutional differences in the distribution process of produced welfare and their impact on social stratification. The various means of distribution and redistribution of resources are perceived as being different models of welfare states (Esping-Andersen 1990; Golinowska 2018). The declining explanatory power of these traditional models has encouraged the emergence of

new proposals, with the attendant inclusion of additional, non-economic criteria. In addition, as stressed by Golinowska (2018, 20), 'non-social areas, belonging to so-called social investments: education, health care, housing have been increasingly more frequently included in the description of the welfare state'. This finds evidence in modern social-policy models which incorporate variables relating to labour-market regulations and educational services and assumptions of educational systems (see Szarfenberg 2009, 20). When adopting a broader concept of treating social policy as a field of influence, then labour, quality of life, social order and culture – including education – should all be incorporated into the concept of welfare.

The increasing volume of migration and the resultant intensification of transnational engagements bring with them new ways in which to theorise and explain these processes. The proposals offered by Levitt (2007) and Levitt et al. (2017) incorporate into the analysis migrants and non-migrants and the number of transnational engagements. This marks a departure from adopting the perspective of the receiving or the sending country only and thus 'splitting migrants' lives into disconnected areas' (Serra Mingot and Mazzucato 2018, 142), in favour of the simultaneous inclusion of both locations. Levitt et al. (2017) offer an analysis of how migrants navigate transnational social protection spaces to piece together resources across the international borders of nation states. Moreover, they emphasise that social protection should not be perceived only through the prism of the state as the main source of protection but that it should additionally consider three further sources: the market, the third sector and social networks (Levitt et al. 2015, 6). All the resources available to migrants from these four sources, scattered across international borders, constitute migrants' welfare resources environment, which operates transnationally. At the same time, the scope of support available from each of the sources varies for the different individuals and is also dependent on the time and place (Levitt et al. 2015). The content of social coverage is thus partially regulated by the state and depends on the model adopted (for instance in the marginal model, the basic channels of protection include the market and the family and, therefore, the state offer will be insignificant). Conversely, 'the social protections available to any person are strongly influenced by his or her individual characteristics – education, skills, resources, the legal status, the country of origin, the country of residence, the place of residence within a country, social networks and so on' (Levitt et al. 2015, 12).

Nordic countries which represent the social-democratic type of welfare-state regime (Esping-Andersen 1990) are typically characterised by a universal access to social protection and high levels of redistribution (Brochmann and Hagelund 2012; Dziewięcka-Bokun 1999) and are regarded as 'encompassing' welfare states (Korpi 2000). They also, in general, provide universal free access to health care and education (including such aspects as textbooks and educational aids). An important criterion applied to the Scandinavian model is the principle of social responsibility – or activities aimed at having such a social-policy system in which, through the joint collaboration of its citizens, the needs of all community members will be satisfied at an appropriately high level.

In recent years, significant migration from new EU member states to Norway has stirred up a discussion over the universal social-support model that provides (or does not) migrants with immediate access to the resources of the receiving country (Brochmann and Hagelund 2012; Strzemecka 2015; Ślusarczyk and Pustułka 2016; Ślusarczyk et al. 2018; Wærdahl 2016). In the case of Norway, social coverage for distinct categories of immigrants differs. For example, Polish and other EU/EEA migrants are not entitled to free Norwegian language courses, as they are viewed by the authorities as self-sufficient migrants moving to Norway primarily for work reasons. They must pay for these courses or look for alternative sources of support (e.g. free courses arranged by various organisations).[2]

5.3 School as an Element of the Welfare State

The school has a special place in the analysis of processes relating to migration. Since education is compulsory, it becomes a test of the adopted strategy of integration; in view of the common belief in the importance of both a formal education and the knowledge and skills for life that an individual gains at school, education is an object of constant interest among parents (see Lopez Rodriguez 2010; Mikiewicz 2016; Niezgoda 2011; Ślusarczyk 2010). From a state point of view, the school is a place in which to shape citizens; similarly, it is an object of constant interest among politicians (Boli et al. 1985; Coleman and Hoffer 1987; Hadjar and Becker 2009; Labaree 2012; Meighan 1977). For migrant families with children, schooling can be a turning point, since the decision about which country their children will go to school in involves a choice between returning to the country of origin or settling in the receiving country.

The current form of the Norwegian educational system was shaped after World War II. Its fundamental features include a uniform educational system and curriculum and a teachers' educational system standardised across the country (Mańkowska 2012). Key values of Norwegian society include egalitarianism and co-operation, both of which researchers trace back to historic conditions: the absence of either a feudal system or a home-grown aristocracy, which led to the development of a 'country of farmers and fishermen' (Aase 2008, 13–17 cited in Mańkowska 2014, 54). The inclusiveness of the schools, the equality, the co-operation of the social partners and the solidarity of the citizenry are all based on these same assumptions. The purpose of the system is to provide children and young people with an equal right to education, regardless of their place of residence, gender or social and

[2] It is arguable whether access to free language courses is indispensable in the case of economic migrants and whether it should be treated as a part of social-welfare protection. Moreover, highly skilled migrants from third countries who are staying in Norway on temporary work permits are not, as a rule, entitled to unemployment benefit. However, migrants themselves perceive this lack of access to Norwegian language courses as a form of inequality (Ślusarczyk 2019).

cultural background – thus the provision includes those who are migrants.[3] The adoption of these goals, among others, meant that there would be no selection or segregation of pupils according to ability and also no practice of having a student repeat a class within the period of compulsory education (primary schools and the first level of secondary school). Furthermore, there would be no separation of children with special educational needs (the disabled, immigrants and those lacking knowledge of the mother tongue).[4] The school is also obliged to take care of the necessary facilities and professionals, e.g. teacher assistants (Mańkowska 2014; Ślusarczyk 2019). The Norwegian school expects solidarity and co-operation from parents and assistance in the attainment of the various educational, socialisational and integrational goals by, for instance, working together to organise extracurricular activities or friendship groups[5] (Mańkowska 2014; Wærdahl 2005, 2016).

5.4 School and Life Chances

As mentioned in the previous section, the decision to send a child to school in the receiving country often resulted in the family either settling there permanently or at least for the long-term (Gmaj 2016; Ryan et al. 2009; Ślusarczyk and Pustułka 2016). Even if immigration seems to be a short-term solution to economic difficulties, as soon as the children's schooling is involved it becomes a point of reference. One of the main factors here is the comparison of the educational opportunities in Poland and Norway. Based on this assessment, parents decide which educational system can provide their children with better life chances. As it is broadly understood, the term 'life chances' encompasses the parents' imagination and ideas concerning the future of their children – in particular, the educational, professional, economic and social prospects that would enable the children to maintain their

[3] Developed in the period after World War II, the model remained in place until the 1990s, with just minor modifications. It was meant to embody socio-democratic ideas and thus, primarily, to provide equal educational opportunities (Mańkowska 2014). It also implied the marginalisation of non-public schooling as it was felt that private schools contributed to an increase in social differences. Introduced as of the 1990s, neoliberal elements, especially the principle of freedom of choice and adjustment to a competitive market (Ahonen 2002) brought about changes – such as a turning point in the case of private schools (since 2002) – and the publication of school rankings in terms of the students' performances at the end of the compulsory education stage, which had been prohibited before (Welle-Strand and Tjedvoll 2009).

[4] Some municipalities and/or schools place migrants in special schools or classes. However this is an opportunity for children with a migration background to receive support from bilingual teachers in introductory/welcome classes or school until they know enough Norwegian to join the regular class. The choice of solution depends on the policy adopted, the financial possibilities of the commune and the number of migrant children (Ślusarczyk and Nikielska-Sekuła 2014; Wærdahl 2016).

[5] A school class is subdivided into smaller groups – friendship groups (in Norwegian, *vennegrupper*). The parents of the children in the group are supposed to organise a social gathering at the start of the term and invite all of the children from the group to their homes. The children can play together while the parents spend some time together and get to know each other better.

parents' social status or even allow them to take 'one step up on the ladder' are all taken into account (Brown 2013; Croll 2004; Lopez Rodriguez 2010).

In general – and not simply in the case of migrant parents – Polish parents' aspirations and expectations for their children's education are relatively high (Kozłowski and Matczak 2014).[6] In Martha Nussbaum's (2016) division between education for profit and education for democracy, the focus of Polish parents is more on the sphere of future benefits and what they would expect from schooling (Guðmundsson and Mikiewicz 2012; Mikiewicz 2014; Ślusarczyk et al. 2018). Randall Collins (1979) called it a strategy of 'escaping forward' when individuals try to achieve more 'credentials' and educational accomplishments (diplomas, certificates etc.) to grant themselves (or their children) a 'better future'[7] but sometimes also in order to avoid social or economic deprivation. The high aspirations of Polish migrants correspond to the situation in post-transformation Poland, when seeking to achieve a higher level of education was a coping strategy against unemployment and growing differentiation in society, as in the 1970s in the United States (Adamski 1977, see also Długosz 2009, 2013; Gmerek 2011; Ślusarczyk 2010). Although this strategy did not lead to success but, rather, to the depreciation in the value of diplomas and an increase in social inequality, it did, however, spread across Polish society (Długosz 2009; Nyczaj-Drąg 2011).

Polish migrant parents' experiences of the post-communist transformational period in Poland, with its many years of unstable labour markets and low wages, make them no exception. Even if, as migrants, they accept deskilling or a lower social position themselves, when it comes to their children they present different expectations (Garapich 2016; Lopez Rodriguez 2017). When reflecting on their children's education, Polish parents prefer the strategy of an 'escape forward', choosing the educational system which they perceive as better and – if possible – seeking greater advantages (e.g. choosing the school assessed as being the best, with additional activities for pupils and exerting pressure to achieve the best results). Such an approach is the most characteristic among parents from the middle and upper classes (Sadura 2018) and may be termed a transnational game for seeking greater opportunities everywhere.

[6] Data on the level of parents' expectations is provided by cyclical PISA surveys (Dolata et al. 2013; Federowicz 2013; Federowicz and Sitek 2017). They document their unchanging high level – about half of parents hope that their children will obtain at least a Master's degree and about 30% are counting on a doctoral degree.

[7] In terms of social status and a professional career in knowledge-intensive economies which push up the skills premium (Esping-Andersen 2005).

5.5 Methodology

The empirical material that serves as the foundation of our analysis was collected within the framework of the research project *Transfam*.[8] This chapter is more particularly based on 31 biographical interviews, partially structured, conducted with 41 persons. Respondents were Polish families living with their children in Oslo and its environs who had lived in Norway for at least 6 months (the longest stay was over 20 years, while the average was 8.5 years). Our respondents consisted of 10 couples interviewed together, and 21 individual interviews, 19 women and two men. Such disproportions are not uncommon in family research as women tend to be the 'default' informants on family matters, especially in societies with the rather traditional gender order one finds in Poland (see e.g. Kilkey et al. 2013 or Pustułka 2015). The number of children per family varied between one and five and their age from a few months to early adulthood (23 years of age). There were substantial differences in terms of their place of origin, education and professional status. The respondents came from different regions of Poland, both from big cities (including Warsaw) and from smaller towns and villages. Their educational background was diverse: 27 held a university degree, 11 graduated from high or technical schools and three from vocational schools. The majority (32) of respondents were employed (from low-level jobs to prestigious positions), whereas nine were unemployed or currently not working (e.g. maternity leave).

The scope of the research covered a wide range of areas related to migration and family life: from the decision to leave, through settlement, to any potential decision on staying longer or permanently. We were also interested in the process of entering the labour market, how leisure time was spent, in the division of roles in the family and how the children were being raised. Education was a particularly important area and we inquired about the process of making educational decisions – including sending children to kindergarten and the perception of the school and related expectations, about learning the Norwegian and Polish languages and, among others, about the possible decision to send children to a Polish supplementary school, as well as about their family language strategies.

[8] *Doing Family in Transnational Context. Demographic Choices, Welfare Adaptations, School Integration and Every-day Life of Polish Families Living in Polish-Norwegian Transnationality* (2013–2016). The project was financed by Norway Grants under the Polish-Norwegian Research Programme carried out by the National Centre for Research and Development, Contract No. Pol-Nor/197905/4/2013. The fieldwork took place in February–March 2014 by Paula Pustułka, Inga Hajdarowicz and Anna Bednarczyk.

5.6 Migrant Strategies in the Context of the Welfare State

5.6.1 Norwegian School in the Eyes of Polish Parents

A division into narrower and broader understandings of the welfare state is important in the context of the analysis of migrant strategies. We believe that the migrants' point of departure is usually first the view from a labour-market perspective, labour protection and the prospect of welfare and social protection[9] and Norway is very highly rated in these areas (Isaksen 2016).[10] The early stages of Polish migration to Norway right after the enlargement of the EU were dominated by men, mostly with a lower level of education and qualifications, who migrated for employment mainly in the construction and fossil-fuel industries (Friberg and Eldring 2011; Friberg and Tyldum 2007; Iglicka et al. 2016, 2018). An important factor involved in the decision to migrate was the difference in pay and purchasing power, which meant that the migration of only one member of the household appeared a sensible, pragmatic choice, with the rest of the family remaining back in Poland (Friberg 2012; Sokół-Rudowska 2011).

The second, less common form which, nonetheless, marked a more distinct trend, was made up of migrants who would arrive with their families from the start or who would quickly bring them in to the receiving country (Gmaj 2016). Generally, such migrants have a higher educational background, their position on the labour market is also better and their perception of Norway as a welfare state is broader and relates to the life chances of their children, too.[11] Thus, with the extension of their stay in Norway, the perception has expanded to include the dimension of the work–life balance, and, within the family context, a reflection about the consequences of either staying or returning for the future of their children (Gmaj 2016; Iglicka et al. 2018). First of all, they become aware that, if their children start to attend school in Norway, the family will probably stay for a longer period of time. Adam[12] (8 years in Norway), one of the fathers interviewed, stressed that it 'would be hard' for his daughters to change school where they have friends and also to get used to a different educational system. Knowing Polish school from his own experiences, he

[9] There is also, of course, a range of other migration reasons – e.g. family matters, marriage or quality of life in the receiving country; nevertheless, labour migration is the dominant type among Polish migrants (e.g. Huang et al. 2015).

[10] Existing research shows a worse situation for migration workers in that respect. In the case of Polish migrants, the instability of employment, pay discrimination, failure to comply with OHS (Occupational Health and Safety) rules or gender-related opportunities on the labour market are indicated (Engebrigtsen et al. 2017). Simultaneously, migrants point to activities of the Norwegian Tax Administration, or *Skatteetaten,* which persecutes dishonest employers, while stressing that these are conspicuous but not common cases. A major proportion of Polish migrants declare that they enjoy favourable and stable forms of employment (Huang et al. 2015).

[11] This statement was confirmed by most of our respondents (see also Gmaj 2016; Huang et al. 2015).

[12] The names of all respondents have been anonymised.

was convinced there would be 'big obstacles and curriculum differences'. So, as Huang et al. (2015) point out, sending a child to a Norwegian school is one of the most important reasons for staying longer or even for settling in Norway. The other perspective is the calculation of life chances. Sabina (6 years in Norway) and her husband decided that their son, 'who was bilingual and in general felt good here', had greater opportunities in Norway – by which they understood the possibility of studying at a good university and obtaining a better career in the future.

When migrant children start at a Norwegian school, the parents' first concern is how well they will cope with the new situation. Their worries relate to their children not possessing sufficient Norwegian and not adapting to the school environment due to their migratory background. They appreciate, therefore, the language support for children – like, for instance, introductory classes or a native language teacher. They stress the importance of individual assistance for children which, in their case, is especially needed at the early stage of learning the language, as Jan (7 years in Norway) explains about his daughter, A.:

> Of course, the beginnings were quite hard, because she started to learn Norwegian in kindergarten then, on the first or second day, we got a phone call that we had to go to pick up the child, because she was crying horribly (…). And one of the tutors, such an old lady, very, very patient, would sit her on her lap and teach her Norwegian words. After two weeks there were no problems at all and next, it just went on smoothly. So, there weren't any problems or complaints or issues with A.

Parents also appreciate the Norwegian schools for the reduced burdens imposed on their children. Cyryl (14 years in Norway) stresses that 'they [the pupils] are not graded here' [in primary school]. He is not sure in which year grading begins – he thinks the third or fifth grade[13] – but he perceives the fact that it is impossible for the child to fail as an advantage. Some parents rate the school curriculum positively, likewise with the emphasis put on the ability to take care of themselves. Sabina admits that 'they [Norwegians] bring up children differently here' and emphasises that her son, in his first school year, 'beautifully learnt how to prepare food'. She compares this with her own experiences with Polish kindergarten[14] where everything was served and, therefore, believes that the Norwegian educational system is more focused on practical skills. Other parents value the fact that the curricula are not overloaded compared to Polish schools and that children are also taught empathy and encouraged to express their emotions, talk about them and try to understand them. Some of the respondents pointed out that this will probably produce better learning results than the larger number of hours spent at school and the intense pressure to succeed found in Polish schools.

With time their opinions tend to become more nuanced. What at first seemed like an advantage (the curricula or the way of teaching and learning) later raise concerns

[13] In fact it is from eighth grade. This quote demonstrates that migrant parents are familiar with the system only to a certain degree – there are things that they do not yet know.

[14] The respondent is referring to the pre-school period because her child, who in Norway has already started attending school, would still have been in kindergarten in Poland, where school attendance is mandatory from age seven, although it is possible for a six-year-old to attend.

and sometimes criticism. The respondents, like Kornelia (8 years in Norway) are also used to comparing the requirements in Norwegian schools to those in Poland (at least as far as they can remember or have been told by relatives):

> The educational system, well… far behind, but I won't say behind who. If P. [daughter] had come here at the age of 10, she would have been a year or two ahead of her peers. My brother is a year older than P. and is a fourth-grader [in Poland] and the maths curriculum is at a much higher level; they here… I don't know… have a different level of teaching and educational system.

The comparisons quoted relate to a very important aspect concerning the attitude towards school or, namely, aspirations. Kornelia expressed the concerns of many Polish parents who expect a high level of teaching, often identified as a good quality education. They hope for good school results and, if possible, special achievements (e.g. winning school competitions etc.) because they equate these with increasing the life chances of their children. The equality and inclusiveness at school that migrants favourably assess at the stage of entering the educational system, when later confronted with their aspirations, become an obstacle (Ślusarczyk 2019; Ślusarczyk and Pustułka 2016). Referring to Norwegian schooling, Polish parents thus asked themselves if was 'good' or, rather, if the level of transferred knowledge would provide their child with the opportunity to go to a good secondary school and university and then on to a well-paid job. If the answer was negative they tended to seek solutions which would increase their children's educational chances. Confronted with Norwegian society and its school system, migrant parents appreciate the egalitarianism and inclusiveness and accept the language or integrational support but would also like to 'equip' their children with extra skills or competences.

Moreover Polish migrant parents, in their first years in the receiving country, do not fully understand the Norwegian concept of education, which assumes a deeper parental involvement in the life of the school (e.g. organising extracurricular activities, participating in voluntary work or actively taking part in friendship groups). They do not see these as activities that are beneficial to the children but as additional burdens. Patrycja (17 years in Norway) refers here to a fundamental argument often put forward by Polish immigrants – since she works hard, the school should not and could not demand too much from her. Part of this reasoning is also due to the fact that, in the Polish educational system, neither intense parental involvement nor socialising with other parents is expected.[15] With time, however, 'for the sake of

[15] The role of the parent is still seen as quite passive although the education law creates a space for home–school collaboration (Banasiak 2013; Mendel 2002; Zbróg 2011). Parental committees sometimes contribute to the cost of investment and occasionally carry out any necessary renovations etc. or provide support with regard to organising school excursions or events but only a few parents are interested in being a member of such a committee (Ślusarczyk 2010). There is also very limited parental interest and willingness to partake in shaping the school's curriculum, lesson plans, etc. (though some schools do involve parents in these decisions). The parents' involvement also depends on many other factors, especially their socio-economic status and social milieu. There are also huge differences between public and private schools where, in the latter, parents can sometimes influence the whole process of schooling. Still, as most of our respondents confirm,

their children' (Malwina, 11 years in Norway) migrant parents become more and more involved and have an opportunity to gradually accept or follow the expectations of actions of solidarity aimed at having the best school possible. An example could be Antonina (24 years in Norway), who now runs sporting activities at school. Magda (8 years in Norway) helps with all school events and Malwina was, for some time, engaged as a native language teacher.

5.6.2 Increasing Life Chances – Parents' Supplementary Strategies

Despite entering the Norwegian educational system, Polish migrants in Norway remain in a transnational complex of relationships, references and beliefs. When calculating the life chances of their children, they measure staying in Norway against a potential return to Poland or migrating to another country. This means that they tend to transfer solutions from Poland – or those applied in a competitive system – into the realities of school in Norway, since migrants would then benefit from both what they receive under the welfare-state approach – egalitarianism and inclusiveness – and from the additional resources with which they would 'equip' their children. The basic solution here requires permanent interference in the learning process of the child and the expectation of achievement. One of the mothers interviewed told us how she had to look on the Internet for additional homework exercises for her daughter who, according to her, 'was not sufficiently stimulated' at her Norwegian school. She also said that the school 'just undermined' her daughter's capabilities and did not benefit her at all and she regretted that the Norwegian school did not encourage pupils to take part in international competitions like '*Kangourou Sans Frontières*'.[16] Finally, she moved her daughter to an international school as she considered it to be more supportive and more responsive to her daughter's needs.

Another interviewee, Agata (4 years in Norway), did not change her daughter's school but was actively pushing for her daughter to achieve the best results possible – doing her homework with her and sometimes even for her. She admitted that 'it was not that fair; perhaps the other children had written it on their own' but all she wanted was to help her daughter. She was anxious about her daughter's school results and tried to motivate her to work more by repeatedly telling her she was good but could be even better if she tried harder.

In their efforts to increase their children's educational opportunities, Polish migrant parents also seek solutions outside the school system, such as educational camps or summer schools in Poland (especially focused on Polish

Polish migrants come to Norway with the conviction that family and school operate as quite separate institutions.

[16] *Kangourou sans Frontières* is an international association founded in France to support the teaching of mathematics in schools and to promote a positive perception of the subject. Its most popular activity is the annual Kangaroo Mathematics Competition.

language-learning) or attending Polish Saturday schools in Norway.[17] This fits into a strategy of navigating resources locally and across borders to increase the sense of safety and their life chances in the case of children (Levitt et al. 2017). Jan, for example, sent her daughter for the summer holidays to Poland and part of that time was devoted to studying to 'brush up both her Polish and English'. Helena (17 years in Norway), in turn, urged her daughters to attend a Polish language summer school at a Polish university because the additional language meant better results at their Norwegian school and greater opportunities during the university recruitment process or 'sometime at work'. According to her, it is a strategy pursued by many families:

> The parents explain it saying 'Listen, you'll pass a Polish language examination here and you'll have it on your school certificate and it's simply an additional foreign language, right, and you're a certified user of it'. So they are working hard here to get such grades and those ambitious children pass those examinations here and she already wants to do that now.

Migrant parents admit that this strategy is sometimes quite difficult. While younger children are happy to attend the supplementary school as they can meet other Polish children and play together, older children are less willing to continue their Polish education. Ela (17 years in Norway) told us that her daughter complained a lot that she had to spend Saturday[18] at school but her mother felt that it was worth it because 'maybe someday it will be useful for her'. On the one hand, this can be perceived as an example of Collins' 'escaping forward' but, on the other, it could also be an example of how migrants navigate their resource environments (Levitt et al. 2017). In order to secure her child's future, the migrant uses various elements of the 'package of protection' to which she has access. Another interviewee, Kaja (4 years in Norway) followed the same strategy. As she admitted, at that time she had no intention of returning to Poland but wanted her son to learn Polish because they 'did not know how it [the dice] would roll in the future' – perhaps her family would have to return to Poland or her 'son would like to study in Poland'. Helena, cited above, emphasised that, after the crisis period had passed, her daughter found the schooling useful for her future, her mother describing it as 'a new way of thinking'.

5.7 Conclusions

Do Polish migrant parents resort only to using the assumptions of the welfare state in the area of education – egalitarianism and inclusiveness – when designing for themselves national and transnational strategies for gaining resources for their children? The education system acts like a magnifying glass, showing the Nordic

[17] The most important reasons here are to preserve a link to the sending society, to maintain family ties or to foster national identity but there is also a utilitarian motive.

[18] In most Polish supplementary schools in Norway, classes take place on Saturdays.

welfare model with its key principles of social solidarity, freedom, equality, co-operation and mutuality. However, as we have seen, in the case of migrant parents one of the key issues is the assessment of the education system and educational opportunities in both the country of destination and of origin. Certain ideas and patterns known from the country of origin are confirmed and strengthened by transnational practices and how they function in the transnational social field. Relationships with children and parents in Poland or the community of origin and the exchange of experiences and judgements cause migrant parents to constantly draw comparisons between the two systems. At the same time, due to their experiences of the post-Communist transformational period in Poland, with its many years of high unemployment and an unstable labour market, these parents tended to build strategies for increasing their children's life chances. They perceive the education system as a key factor in achieving this goal and treat it as a valuable resource. Yet they understand education not as a good that should be equally accessible and granted to all children but, rather, as limited capital. As a result, a position of rivalry becomes the preferred attitude, with the focus on the benefits to their own children. The parents' attitude towards the school system is – especially in the first years – somewhat pragmatic and individualistic rather than cooperative.

May it thus be summarised that, in general, Polish migrant parents show less involvement in the life of the school and treat it instead as a service? Our findings demonstrate that their lack or lower level of engagement may be caused by their unfamiliarity with the Norwegian education system and their expectations of school. Polish assumptions are transferred onto Norwegian schools, especially the conviction that the lives of the family and of the school lie in separate spheres of reality. At the same time, these parents have been willing to co-operate primarily because of their children – so as not to harm them. Moreover, living in a transnational space, they learn to navigate resources accessible in both countries in order to receive and provide social protection (Levitt et al. 2017). Finally, to a certain extent, it is – as our narrative demonstrates – simply that both the passage of time and their increasing integration into Norwegian society reveal that the migrant parents' approach may be subject to change.

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Chapter 6
Settling for Welfare? Shifting Access to Welfare, Migration and Settlement Aspirations of Filipina Single Mothers in Japan

Jocelyn O. Celero

6.1 Introduction

Japan provides a compelling case for interrogating the relationship between welfare, migration and citizenship for several reasons. Firstly, its declining fertility rate and rapid ageing bear implications for the budgetary allocation of social provision. These demographic changes, coupled with a stagnating economy, pose a challenge to Japan's capacity to provide for the welfare of its elderly and ensure the overall well-being of its families (Sano and Yasumoto 2014, 319). Second, ageing brings about ambivalence in the life chances of future Japanese citizens, while the rising cost of raising children affects Japan's desirability as a place of permanent settlement for migrant families. Thirdly, as the working-age population declines, Japan must induce the employment of its young and female members (as well as migrants) who will bear the brunt of the welfare system. Such social change may undermine the hard lines of gendered labour. Fourth, the slow but steadily rising number of immigrants raising their Japan-born children – as single mothers or as parents in a mixed family – invokes questions about social citizenship and welfare accessibility.

Building on interviews with and the life narratives of Filipina single mothers in Tokyo, this qualitative study examines how various kinds of social support impact on their migration aspirations and trajectories in and beyond Japan. It does so through analysing their welfare resource environment (Righard 2008), looking into their access to public social protection across the life course in relation to the family provisions available in Japan (and in the Philippines to some extent), the responsibilities commensurate with social benefits and their perceived inclusion in or exclusion from Japanese society. Lastly, the study discusses the extent to which receiving social protection across borders influences the migration and settlement aspirations

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of Filipino immigrants. The remainder of this chapter introduces the context of immigration and welfare support in Japan, discusses theoretical concepts, research methods and data and summarises the findings.

6.2 Immigration and Welfare in Japan

The steadily declining birth rates and rapidly greying population have raised profound questions about the future of work and family life in Japan. Yet Japan remains reluctant to open its borders and support the permanent settlement of immigrants, whose numbers account for 3% of the total population (Ministry of Justice 2019). Japan's restrictive immigration regime has left migrants with relatively few ways of entering the country; these few ways take the form of family migration (by marrying a Japanese national), student migration or migration into the business sector, under all of which pressure the newcomer to assimilate into Japanese cultural practices and norms is high (Liu-Farrer 2014).

In April 2019, the right-wing government under Prime Minister Shinzo Abe resolved to accept thousands of migrant workers in order to address the labour shortages in 11 industries or sectors, including nursing (Rich 2018). This recent immigration decision, however, drew mixed reactions from the public and civil society. With Japan's 'revolving door' disposition towards migrants, the government continues to face the challenge of fully integrating its foreign residents and recognising their broadening social roles (Takao 2003, 552). On the contrary, the general Japanese population holds fairly positive perceptions about immigration. According to the 2018 Global Attitudes Survey, for instance, the majority of Japanese respondents viewed immigrants more as contributing to job skills and the talent pool of the country (59%) than as being a social burden in terms of access to jobs and social benefits (31%) (Stokes and Devlin 2018). The study, however, does not account for whether these attitudes concern only migrant workers or are relevant to permanent foreign residents as well.

Filipinos constitute a group of permanent migrant residents in Japan. The bubble economy of Japan in the 1980s stimulated an increased migration of Filipina migrants (or Filipinas) in response to the growing demand for sexualised and reproductive labour. They are identified as either *hanayome* (brides) to Japanese men in rural areas or *Japayuki* (bound for Japan) entertainers working in Japan's booming nightlife districts. By raising families with Japanese nationals, most Filipina migrants have settled in Japan permanently. Permanent residency is made available to immigrants who have been in Japan for 10 years, while long-term residence is bestowed on migrant women who are granted legal custody over their child with a Japanese father (Ishii 2005; also cited in Celero 2017, 196) who recognises such a decision. The number of Filipinas with a long-term residence permit (on the basis of having Japanese-born children) increased from 37,870 in 2010 to 51,097 in 2018, while the number of permanent residents rose from 92,754 to 128,446 during the same period (Ministry of Justice 2018).

However, not all Japanese-Filipino marriages were successful and not all Filipinas married in Japan. There are one million Japanese and non-Japanese single-headed households (mostly single mothers) in Japan, marking a 50% increase between 1992 and 2016 (Ministry of Health, Labor and Welfare 2016). As parents to Japanese-born children, some Filipina migrants are eligible for a number of social support programmes. Developed largely after World War II, Japan's social welfare system consists of various monetary, service and other provisions primarily targeting poor and vulnerable members of its population (Furukawa 2008; Komatsubara 2012; Miyamoto 2003). With its limited welfare state, Japan has always underprioritised its social policy (Holliday 2000). Amid its steadily ageing population, Japan only began to allocate 20% of its GDP for public social spending on elderly care and healthcare in the early 2010s (OECD 2012).

The legal framework for Japan's welfare system is called 'Six Social Welfare Laws' and consists of the Daily Life Protection Law, the Child Welfare Law, the Mother with Dependent and Widow Protection Law, the Welfare Law for the Aged, the Law for the Welfare of Physically Handicapped Persons and the Law for the Welfare of Mentally Disordered Persons (JICA 2009; Koijima 2011). All single parents are entitled to the universal Child Allowance (CA). Single parents who pass income tests can also receive the Child-Rearing Allowance (CRA), which amounts to 41,720 Japanese Yen or JPY (approx. US$ 380) per child per month and is paid – if the parent's annual income is less than JPY 1.3 million (US$ 11,900) – until the year in which the child turns 18 years old (Komatsubara 2012). This allowance is paid for partly by the national government and, since 2006, the prefecture and the municipal government (Komatsubara 2012). Factors that shape access to the CRA include the number of children and the age of the parent. While paid together with a much-reduced CA, child support payments are time-bound and can only be used to supplement the family's income (Ezawa and Fujiwara 2005).

The total decline of the fertility rate to a record low of 1.57 in 1989 prompted the Japanese government to shift the goal of social policies from being family-oriented to achieving a work–life balance, further enhancing childcare services (Abe et al. 2003; Ikezoe 2014; Komatsubara 2012). The Angel Plan, among other measures, tripled the number of daycare services and child-minding centres, from about 2000 to 7000 across the country (Boling 1998). Reforms were introduced to the social welfare system in 2000, shifting from administrative to contract-based welfare arrangements, with the national government obliging local government units (cities, towns and villages) to be more involved in welfare planning (JICA 2009). Consequently, daycare centres grew exponentially and gave more options for working mothers although the privately run ones tend to cost more and are of better quality than government-funded types (Abe et al. 2003). By 2015, the number of childcare facilities had increased to 24,234, of which 15,380 were privately and 8854 publicly funded (Ministry of Health, Labor and Welfare 2015).

In the absence of a male provider, single mothers without their own income can also apply for public assistance, known as the Living Subsidy Allowance (*seikatsu hogo*). The Living Subsidy Allowance (LSA) supports all residents (regardless of gender, nationality and economic status) in meeting and maintaining minimum

standards of living and achieving socio-economic freedom (Aoki and Aoki 2005; Ezawa and Fujiwara 2005; Furukawa 2008). Living subsidy recipients obtain protection from poverty and inequality through securing assistance in eight categories of need: a basic living allowance to cover food, clothing and utilities, housing costs, compulsory education, medical care, elderly care, the cost of giving birth, skills training and funerals (Komatsubara 2012; OECD 2012). In exchange, these recipients are encouraged to work in order to lead a decent and independent life. The number of households on public assistance went up from 1.27 million in 2009 to 1.64 million in 2017, indicating rising incidences of household poverty in the country, with single-parent households of a single mother and her children below 18 years old reaching almost 93,000 (Ministry of Health, Labor and Welfare 2017).

In the post-World War II period, the living subsidy allowance was available solely to all Japanese citizens in accordance with the Daily Life Protection Law. In 1954, following the local governments' humanitarian decision to give support to foreign residents in need, the scheme began assisting 'special permanent and permanent residents, spouses of permanent foreign residents or Japanese nationals, and those who received refugee status from the government' (Ezawa and Fujiwara 2005). Preferential grants and the allocation of public housing (*danchi*) were likewise extended to low-income or single-parent families.

Despite the Japanese government's efforts to promote inclusivity within the welfare system, the gradual diversification of welfare schemes further reinforced social inequality, disaggregating Japanese citizens and non-citizens and, at the same time, producing hierarchical categories of welfare dependents whose usage is contingent upon their migrant (*vis-à-vis* non-migrant) and socio-economic status. In her study, Celero (2014), for example, explained that Filipino mothers on public welfare formed a group of living-subsidy recipients situated on the lowest rung of Japan's dual social hierarchy. On the first level, citizens and migrants on living-subsidy support are situated below those who are not on welfare and paying taxes and are able to maintain high standards of living. On the second level are migrant groups who access different kinds of welfare support.

6.3 Theoretical Framework

To provide a structured analysis for this study, I used welfare, transnational social protection, the life course and im/mobility as conceptual tools, Carling's aspiration/ability model as the theoretical reference and the life-course model as the basis for my analytical design.

Welfare is understood here as a set of policies, practices and relations that are central to the management of the subject population and their conduct (Clarke 2002, cited in Morgen and Maskovsky 2003, 321). As an extension of governmentality, welfare policies in general are designed to promote equality, social inclusion and well-being (Kotkas and Veitch 2017, cited in Atac and Rosenberger 2018, 3). Access to social welfare is a function of one's citizenship or membership in the nation state.

In other words, social-welfare benefits are entitlements based on a person's social citizenship. Social citizenship, according to Turner (2008) designates a dual process of inclusion that entails the redistribution of resources and exclusion marked by the formation of strong identities based on assumptions about ethnicity, gender and class. People can access social support through specific contributions made to society, such as activities of social reproduction – giving birth – child-rearing and maintaining a household. Capturing the constitutive relationship between welfare systems and human migration, the concept of transnational social protection is useful for describing the ways in which migrants knit together their own and their families' social protection from different sources located across the borders of nation states (Levitt et al. 2018). De Jong and de Valk (2019) likewise recommend paying attention to the welfare systems in the countries of both origin and destination. I argue that migration, along with the change in migrants' socio-economic status, legal status, residency and social networks, affects the welfare arrangements and the degree to which migrants participate in social reproduction and other obligations.

The analytical approach used for these data is that of the life course, giving salience to the intersectionality of life events, time, risk and uncertainty with interaction in the analysis of social and demographic change (Willekens 1999). Emerging from the field of developmental psychology, the life-course approach has gained traction in international migration research, recognising that migrants are embedded in societies and social processes across borders and that migration is integral to people's lives over time (Bailey 2009; De Jong and de Valk 2019; Wingens et al. 2012). By examining the 'continuities, twists, and turns in individual lives' (Hutchison 2018, 8), a life-course approach in research emphasises the social agency of humans navigating systems of opportunities and risks while making life choices and constructing life journeys. In the context of this study, a life-course approach is useful in presenting the major migrant life transitions through which Filipinas seek different social provisions from their changing resource environment in order to better organise their migrant family lives. Building on these life events related to marriage, family formation and employment helps us to understand how the migration and settlement aspirations of Filipina immigrants are influenced by their life experiences, relationships and interactions with both Japanese and Filipino society.

In addition, this study engages with Carling's aspiration/ability model to theoretically explain the inextricable relationship between migrants' access to welfare support and their life-course events, migration and settlement decisions and trajectories. In his aspiration/ability model, Carling (2002) theorises that im/mobility is shaped by at least three conditions: (1) opportunities for legal migration from developing to industrialised nations, (2) labour migration as a fundamental characteristic of developing economies and societies and (3) the increasing number of people leading transnational lives, relations and everyday activities in two or more nations. Despite the emphasis given to involuntary immobility – i.e. aspiring to migrate but unable to do so – and the greater preference of migration over non-migration, the aspiration/ability model acknowledges the dynamic interaction between structure and the social agency of migrants and recognises that such interactions become

more complex over time, resulting in a range of available migration pathways (Carling and Schewel 2018). The present research shows that, whereas some Filipina immigrants are likely to settle in Japan, others plan to return to the Philippines in the future; such aspirations, however, are contingent upon the continuous evaluation of macro- and personal-level factors. At the macro level, they are affected by the restrictive nature of immigration, labour and the welfare policies of the Japanese government as well as the ambivalent acceptance of migrants in Japanese society. On the other hand, individual-based factors such as legal status, residency and social networks variously impact on the socio-economic roles and everyday individual- and family-related activities and bonds that they forge over time in Japan and the Philippines.

This chapter therefore examines how Filipina immigrants' access to and use of social-welfare protection shapes their aspirations to move and settle in Japan and how such decisions are embedded in their life course. It analyses how using a range of welfare services may influence the extent of their commitment to society/societies as members and how these commitments can transform their aspirations and abilities to move across time, between spaces and among immigrants.

6.4 Research Methods and Data

The data are derived from informal and semi-structured interviews with 70 Filipino mothers raising Japanese-Filipino children in Tokyo. I followed their families from 2010 to 2019, through either face-to-face or online communication. The respondents were recruited through the snowball technique and personal networks. The interviews, which lasted 2–3 h depending on the openness of respondents, were aimed at collecting their life narratives by addressing their migration, education and family background and the economic activities and social services received in Japan. The interviews were conducted using a mix of English, Filipino and Japanese languages. In addition, three focus-group discussions with four members each were organised in 2015 and 2016 with Filipinas who are permanent residents in Yokohama and Tokyo. Finally, follow-up interviews were conducted in 2019 in Tokyo and its immediate environs to get updated information about the family and the economic status of 15 respondents and key informants.

Table 6.1 shows the profile of Filipina respondents in this research according to their family background and socio-economic status. Concerning their status upon entry to Japan in relation to education, most of the Filipino interviewees were former entertainers (42), with some college education (41). Their civil statuses also vary, with majority of them being either divorced (33) or married (29) at the time of interview. According to residency status, 54 of my respondents were permanent residents at the time of interview, and 43 of them resided in Japan for more than 20 years.

Table 6.2, meanwhile, shows the family and socio-economic characteristics of Filipinas in my study. As illustrated, there were 41 single parents in my sample. Single parenthood is defined broadly herein as the absence of a male spouse

Table 6.1 Profile of Filipina respondents in Japan

Age group	Education	Status on entry	Visa status	Civil status	Years in Japan
30–39 (11)	High school (5)	Entertainer (42)	Permanent (54)	Divorced (33)	>10 (7)
40–49 (42)	Technical/ vocational (3)	Marriage migrant (17)	Long-term resident (14)	Married (29)	11–20 (20)
50–59 (16)	Some college (41)	Student (5)	Japanese citizen (2)	Unmarried (5)	21+ (43)
60+ (1)	College graduate (21)	Other: Lay missionary (2) Professional (1) Tourist (1)	N.A.	Widow (3)	N.A.

Table 6.2 Family and socio-economic profile of Filipina respondents

Description	Number
Structure	
1. Dual parent	29
2. Single parent	41
Composition	
1. Japanese father, Filipino mother, Japanese-Filipino child	20
2. Japanese father, Filipino mother, left-behind child/adopted child from the Philippines, Japanese-Filipino child	4
3. Filipino mother, Japanese-Filipino child	25
4. Filipino mother, left-behind child in the Philippines, Japanese-Filipino child	10
5. Japanese father (remarried), Filipino mother, Japanese stepchildren, Japanese-Filipino child	4
6. Japanese father, Filipino mother (remarried), Japanese-Filipino child	4
7. Filipino mother, Filipino husband, Japanese-Filipino child	2
8. Filipino mother, foreigner husband, left-behind child/adopted child from the Philippines, Japanese-Filipino child	1
Economic status/livelihood	
1. Full-time job (parent, child, both)	17
2. Part-time job (parent, child, both)	20
3. Business	12
4. (Previously/currently) on living subsidy allowance	10
5. On child-rearing allowance	19
6. On child allowance	22
7. Owns government housing	8

supporting the household. The composition of their family is diverse owing to social factors such as divorce, the lack of a marriage, re-marriage, the death of and/or separation from a Japanese spouse and the re-unification with or separation from one's children. Consequently, their socio-economic status forms a spectrum of socio-economic activities in relation to the Japanese labour market and business and welfare service sectors.

At the time of interview, 17 respondents were employed full-time, while 20 were engaged in part-time jobs in factories, homes for the elderly, laundries, hotels and other service-related companies. Twelve of the women interviewed owned their own business, such as an ethnic store, restaurant, bar and beauty salon. From business-owners to welfare-dependents (Higuchi 2011; Tenegra 2004), the varying socio-economic roles of the Filipino migrants are intimately tied to the life transitions that they go through while leading a migrant family in Japan. The following section elaborates on this relationship.

6.5 Filipina Mothers' Transnational Social Protection

While their welfare environment consists mostly of state, third-sector and personal sources, the Japanese government provides the largest proportion of support for many of the Filipinas in my study. Notwithstanding, the role of migrant support organisations as cultural, language and legal brokers is vital to the Filipina migrants' ability to access the wide range of family and childcare services that the Japanese government provides. At the same time, some Filipina respondents outsourced information, economic resources and care to their personal networks and extended family in the Philippines in order to reconfigure their family life in Japan.

This section takes a life-course approach (De Jong and de Valk 2019) to presenting the link between welfare arrangements and Filipino mothers' major life-course events such as divorce, single parenthood and employment. It investigates the relationship between structural factors such as immigration, labour and welfare regimes that determine the barriers to and opportunities for social support, host-society attitudes towards migrants and individual factors such as legal status, residency and social networks as resources for activating social agency. I centre my analysis on three major transitions that influenced the lives of my informants in Japan: from marriage to divorce, from a nuclear to a single-parent family and from part- to full-time employment and home-ownership. During the interviews, the living subsidy, child benefit, child-rearing allowance and government housing were identified as major forms of social protection received from the Japanese government, services which were combined with private arrangements with the families in the Philippines.

6.5.1 Marriage to Divorce

Experiences of physical abuse, marital dispute and separation often led to divorce, based on the life stories of 33 of the 70 informants in this study. In terms of their residency status in the country, these divorced women were initially living in Japan either on a spouse visa or on a permanent resident permit due to marriage. Having a Japan-born child allowed the divorced Filipina mothers to secure the long-term residency necessary for remaining and raising their child in Japan. Prior to

getting divorced, some respondents stated that they knew nothing about the social-welfare system of Japan due to the language barrier. Since most mothers rely on their husband and in-laws to access information and support (Ito 2005), divorce often meant a severe economic loss. As a result, many of them, such as 43-year-old Lydia (on the living-subsidy allowance) relied largely on Filipino migrant support organisations for assistance in securing government support.

> When I divorced my husband, I sought the assistance of an NGO who helped me to look for a lawyer because I needed to acquire full child custody rights. Without their assistance, it would have been hard to fight in court because my Japanese language ability was limited then.

Many of my respondent acquired their first public-assistance support after divorce or separation from their Japanese spouse. Some of them also benefitted from the information and emotional support of their migrant friends. The period in which they relied on the living allowance was determined by factors such the age of their children, the state of their health, their residency status and the size of the family. Lia came to Japan as an entertainer in 1991. Before her third contract expired in 1993, she had decided to marry her Japanese boyfriend whom she had met at work. When she gave birth in 1996 to their son, however, they began to have marital problems. Her husband became abusive and rarely helped to take care of their baby. On the advice of her close friend in Tokyo, she planned her escape in 1998, memorising the right trains and buses departing from her town and heading to Tokyo. On arriving safely in Tokyo, her friends helped her to file for divorce and apply for the living-subsidy allowance. Except for clothes, she had nothing to declare at the office when undergoing means tests to prove her eligibility. After a few weeks, her caseworker found an apartment for her where she and her child could start family life anew. She also found a job at the lunchbox factory where her friend worked.

Unlike Lia, who secured permanent resident status prior to separating from her spouse, other Filipina respondents in this study once had an undocumented status which could have hindered their access to welfare support and trigger return migration to the Philippines. Through the assistance of an NGO in central Tokyo, Nerisa obtained a long-term residence permit and consequently living-subsidy support in 2010, a week after her partner's sudden death. Unable to read Japanese and with a 5-year-old daughter to raise alone, she described this event as the darkest phase in her life. She had to file for long-term residency in order to stay in Japan, fearing deportation and eventual separation from her Japan-born child. The NGO provided her with language and legal support to fill out all the necessary documents prior to undergoing means tests. Depending on the Living Subsidy Allowance or LSA, she had to take care of her child full-time. Receiving JPY 170,000 (US$ 1500) a month would have been enough to raise her only child but with an aging mother and a child left behind in Manila, she had to endure sending them JPY 30,000 (US$ 278) for 2 years. Unable to access daycare, she had to wait for her child to reach primary-school age before she could return to work and increase the remittances.

While the LSA has enabled Filipina recipients to head up a nuclear household following divorce, family separation or the death of a partner, the stigmas attached

to this welfare benefit have made them aware of its temporary nature. People receiving the LSA are stigmatised because this denotes helplessness and dependence in life and is often regarded as 'stealing' taxpayers' money. In addition, most recipients are attributed a negative reputation for violating its terms through sending remittances and returning to the home country, leading an undesirable lifestyle or being reticent about finding a job despite their good physical health (Celero 2014). Being aware of the negative public discourse surrounding LSA and the persistent need to support Filipino kin, some respondents sought other welfare services such as public housing and day-care services in order to resume employment.

6.5.2 From a Nuclear to a Single-Parent Family

Changes in family composition caused by divorce affect Filipina's capacity to rear their children. When they become divorced and single parents, only a few mothers strive to raise a child on their own in Japan because it entails huge costs. Thus, only 25 of the Filipinas interviewed could afford to live as a mother-and-child household in Tokyo in the 1990s. Some had to leave their infant in the Philippines, while others had to deal with physical separation until their child reaches school age in order to overcome the burden of childcare. Access to social support and jobs was secured through the assistance of local ward offices, migrant support organisations, social networks or a combination of these agents, depending on the level of Japanese language ability and their years of residence in Japan.

Having two sons to raise, Yolly (50, on child-rearing allowance) thought she did not need to get either of the two types of child allowance. A survivor of domestic violence, she took her children away from her philandering husband despite having a stable life with him. After running away, she sought the aid of their municipal ward office, which then assisted her in filing for divorce and seeking alimony as well as child support from the ex-husband. She realised a few things:

> My ex-husband was really smart; he pledged to give child support to our kids on the condition that I divorce him. I should not have relied on his promise... He did not pay for spousal support and only pledged partial support for our kids... he would only support their education. It's a good thing that the municipal office told me I could get child allowance for my two kids. I receive a small amount every three months but for me it is enough. I believe my kids are my responsibility now and I have to work to give them better lives. I do not need to entrust their future to others. I must prove to my husband that I can make it without him.

Yolly represents those Filipinas in this study who may have benefitted from the CRA but only on a temporary basis and with a limited amount. At the time of the interview in 2011, she was working as a lending investor. Other recipients of the CRA in my study worked full- or part-time. Ezawa and Fujiwara (2005, 51) observe that, since child allowance is not a substitute wages, the government encourages mothers to seek paid jobs by placing their children in public day-care.

A second-generation Filipina born in Japan, Susan was only 19 years old when she gave birth to Yuki. She chose to move to an apartment in Sagamihara City in

south Tokyo, where day-care is more affordable. The city also provides financial assistance and resource materials on childcare to foreign residents (e.g. the Child Raising Handbook). Susan was able to pay JPY 23,000 (US$ 211) every month for day-care from her salary as part-time food shop staff. As a high-school graduate, her job options in Japan are limited. Co-residing with Dina, her mother, who had been living in Japan for 7 years before she was born, Susan manages childcare duties. They take turns in caring for Yuki; Susan tends her son while Dina is at work during the day. From early evening on, Dina takes charge of her grandchild while Susan goes to work in the shop.

Even married Filipinas mothers who are unable to access day-care due to its limited availability seek help from their Filipina neighbours, who can babysit for a small fee. Mothers like Nancy, aged 41 and on living-subsidy allowance, lent a hand to her Filipino neighbour while the latter worked at night. Nancy explains why she helps her friend:

> My friend did not know it would take time for her son to get accepted for day-care and she has found work. When she asked me to look after her son, I could not say no to her because she is a Filipina, and we used to work together at the bar in the past. Yuta gets on with my Toshimi. Besides, I love taking care of kids.

Thus, a short-term, pseudo- or fictive kin system based on close friendship ties (Ebaugh and Curry 2000, 189) is vital when migrant women cope with shortages in childcare facilities and services across Japan. Most Filipino respondents relying on the LSA also applied for public housing to further reduce their financial burden. While waiting for the housing support, some mothers resolved the problem by sending their children to the Philippines where their natal family performs child-rearing tasks in exchange for remittances.

6.5.3 From Part-Time to Full-Time Employment and Home-Ownership

The economic status of the Filipina immigrants in this study has shifted over the last four decades from that of entertainers to workers in the manufacturing, service, education and health-care sectors. In my own sample, 17 women have become full-time caregivers and assistant language teachers, 12 have endeavoured to run an ethnic store or a beauty salon, to buy and sell businesses or set up a home-based English language school, while 20 have remained part-time workers in factories, hotels and shops. The attainment of a secure economic position signals financial autonomy among Filipinas after years of living in Japan.

Contributing to this status, according to single-parent Filipinas, is the convenience of owning a house in a city with a high cost of living like Tokyo. Public housing units are given to deserving applicants through a lottery. Lea and Cristy were former entertainers who had their names drawn in their respective ward offices

in a bid to acquire a public housing unit. Lea, 40, recalls below how she became a public housing (*danchi*) owner in 2004:

> It took me seven years, though, to get a *danchi.* My friend encouraged me to keep following it up. Getting a house was life-changing for my son and me. Before, when I was still an entertainer, I had to send him frequently to the Philippines because I could not take care of him here. When I finally got this house, I was released from getting *seikatsu hogo* (LSA) and I now work in the daytime. I am happy about working for a company now and no longer being fed by the government. I have a better status than those who are on *seikatsu hogo*. I am proud… You know why? Most people think it is tough to get a house from the government… I can now attend to Yuji's schooling. I think it is my responsibility to guide my son...

As Hirayama and Ronald (2007, 23) emphasise, owning a house in Japan, regardless of whether or not it is gained through government assistance, brings a feeling of middle-classness among the Japanese. Similarly, Filipinas in this study emphasised the advantages of owning an actual house in Japan, which includes paying a low monthly rent and being able to manage family and work duties. Cristy (38, on LSA) said the following:

> This [house] is truly a blessing and it gives me a sense of dignity. I am a domestic violence survivor and this house has helped me to regain my self-esteem. I now have a decent means of supporting my children; I don't need a husband.

Both Lea and Cristy recognised how their lives have changed over time from being an entertainer, to a welfare support dependent and to a home-owner and full-time employee. They have achieved a better socio-economic status compared to those stuck on LSA. Since 1998, Japan has introduced employment reforms such as flexible working hours, care leave and options to switch to part-time employment (Peng 2011). As a result, some Filipinas have been able to fulfil parental duties while doing a day job, reducing the likelihood of having to leave their children in the Philippines. Some Filipinas can afford to invite their mothers and siblings (typically sisters) over to Japan to assist with childcare, especially immediately after the birth. Those who cannot do so often opt to send their children to the Philippines for longer periods to save on childcare costs. Government housing enables some single mothers, however, to cope with the family and the difficulty of achieving a work–life balance in Japan.

Acquiring public housing also allowed the majority of my respondents to quit night work and secure a day job – a turning point in their socio-economic lives. Engaging in paid work has enabled them to be in control of their family life since they only get minimal assistance through child allowance. Transitioning to full-time day jobs, along with securing long-term and permanent residency, is a marker of membership in Japanese society.

6.6 To Settle or to Return? The Impact of Social Welfare on Filipinas' Migration and Settlement Aspirations

Increasing numbers of Filipinas have become long-term and permanent residents in Japan recently; obtaining this residential status is a prerequisite for, rather than a consequence of, access to social protection. As Japan's welfare system primarily targets families, Filipina single parents sought the requirements to qualify as social citizens in need of protection. They secured paternal recognition to legally stay and raise a child born out of wedlock in Japan, without which they may face deportation and separation from their Japanese child. They also gathered the necessary information and legal documents to qualify for welfare support in return for fulfilling their social obligations, such as giving birth to, rearing and socialising future Japanese citizens (Celero 2014, 2017). If they construct generally positive views about receiving welfare services as well as towards the Japanese government, why do some Filipinas aspire for a more transnational life trajectory?

Most Filipinas in my research seemed to strongly prefer *denizenship* – i.e. permanent residence with a wide band of social and civil rights – to naturalisation, seeing the former as a flexible and utilitarian choice because it promotes legal mobility, an option they share with Korean and Chinese immigrants (Liu-Farrer 2014). In their respective studies, both Liu-Farrer (2014) and Lee (2005) have observed this is common trend among immigrants in Japan who have achieved a socio-economic status over the years through gainful employment and transnational business, while naturalisation has been revealed as a legal strategy of many less-educated immigrants. In my own sample, Filipinas who have successfully graduated from the temporary phase of social welfare reliance, together with those who have thankfully never known poverty, are not keen on switching to Japanese citizenship and find it convenient to be a permanent resident, like Melissa, 50, who is in receipt of the child allowance:

> I think I am a Filipino citizen for convenience only. But it is also tough to switch to Japanese citizenship because I already inquired about it before… I got lazy because you must declare everything, every single property you have, even your jewellery, your bags, expenses… it was quite troublesome for me to do. But if it were easy like in the US…. Currently, I hold a permanent residence visa... since I have not had any problems with visa processing and all. I do not see the importance of becoming a Japanese citizen.

Some Filipinas doubt other Filipinas' intention to change their citizenship as requisite to seeking inclusion of their family through sharing citizenship with their Japan-born children. Others allude to ethno-nationalist sentiments when asked about their changing citizenship. They affirm their homeland affinity and belonging to the Philippines despite decades of living in Japan, as 52-year-old Sara (on child allowance) recognises:

> I have friends who have already changed their citizenship because they are concerned about travelling abroad but, for me, changing citizenship is more than that. I cannot imagine myself not respecting our [Filipino] flag any more. I do not think that there is a problem with me staying here in Japan as a Filipina. My husband accepted me as a Filipina.

As the narratives suggest, Filipinas' preference for permanent residency fulfils their strategic intent to manage a transnational family and affirms their strong sense of ethnic and national belonging to the Philippines. Permanent residency is a more pragmatic choice through which to negotiate the problem, for single mothers with young children to raise, of settling in Japan and eventually returning to the Philippines; this return is characterised by conditions that revolve around the age of their children: 'When the children are grown-ups', 'When I find a babysitter', 'When I obtain permanent residence' and 'When I secure public housing'. The younger a person's child, the more likely they are to depend on social support and to opt to stay on in Japan. The more inaccessible the childcare support in Japan, however, the more likely they are to outsource childcare in the Philippines in order to reorganise their economic situation in Japan. Access to a broad range of social welfare is less of an influence on their decision to settle than being socio-economically independent, even though they acknowledge its importance in overcoming several family life contingencies, particularly in dealing with the absence of a spouse, as well as the requirements and challenges of raising children in a foreign land.

Another condition that intensifies the im/mobility dilemma is associated with migrants' retirement plans. Most of my respondents in this study are now in their mid-40s to early 60s, indicating that Filipina immigrants in Japan are also becoming older. This demographic trait suggests the changing health status and economic activities in which they could engage in Japan. Those contemplating the timing of their return to the Philippines made mention of their savings as a 'fallback' solution in case they fail to overcome their reliance on social services in Japan. Such a consideration reflects the transnational status paradox (Nieswand 2011) as an outcome of socio-economic inequality between Japan and the Philippines and Kabeer's (2007) observation of female migrant workers from South-East Asia. Filipinas may simultaneously experience downward mobility due to their dependence on family-related welfare provision in Japan and upward social mobility thanks to the remittances and care arrangements that they managed to pull together for their children and families who stayed behind in the Philippines. Other ageing Filipinas who have not managed to build up some savings back home may choose to settle in Japan because there are no clear prospects for their return, as Lia, 50 and on LSA, says here:

> I do hope that they [the Japanese government] will not send me home because I am getting support. I can be anywhere. Here or there will do… it is either here or there. I never expected that I would last this long in Japan but, as the years go by… like last year I fell ill, I had an operation. I had to [get medical support]. But so far, the kids are here, I live in government housing… I am okay with permanent residency, so I am here for now.

As Ong's (n.d.) study with ageing Filipinas suggests, getting older presents a new struggle for Filipina immigrants, who need to create positive subjectivity by continuously working in Japan to alleviate fears about becoming a burden on its ageing society while securing an acceptable standard of life for themselves and families in Japan and the Philippines.

6.7 Conclusions

This paper has explained the links between the welfare access, migration and settlement of Filipino immigrants in Japan. It has discussed the range of welfare arrangements that they are able to access in the host country and the support which they seek from their birth families in the Philippines in order to organise their family and work lives through time and across borders.

Filipina immigrants constitute a group of mothers who have relied on a broad range of social protection over their life course. The most vulnerable phases of their migrant lives include divorce, single parenthood and struggles finding full-time employment. As they go through each of these life stages, Filipinas transition from being completely dependent upon the LSA to combining the child-rearing allowance, day-care services and public housing. Acquiring a public housing unit, landing a day job and managing both work and family life signifies social membership, owing to the greater degree of socio-economic freedom to maintain a transnational household which being a breadwinner and a caring parent at the same time gives them (Williams 1995). An integral aspect of the ongoing improvement in their socio-economic status and image in Japan is their collective and individual desire to break away completely from welfare support.

While they recognise its significance in helping them through episodes of contingency and hardship in family life, Filipinas are not conveniently 'magnetised' by welfare, so much so that they will choose not to exchange their ethnic or national membership in order to obtain it. Having lived and worked for decades, they have attained permanent residency in Japan as a utilitarian choice popular among immigrant Filipinas who wish to keep their options for the future open. Filipino single mothers' aspirations to return to the Philippines in the future or settle in Japan are contingent upon the age of their children, their savings and their dreams of a desirable retirement.

Whereas there is a hierarchy among Filipino migrant mothers on welfare, the various forms of support which they receive represent their continuing efforts to attain socio-economic autonomy both in Japan and in the Philippines. As Filipino women move from one form of welfare assistance to another, they attempt to demarginalise themselves from the generally negative perception of them by Japanese society and to negotiate structural inequalities that render them vulnerable in certain life-course events owing to their being Filipina, a divorcee, a single parent and a low-skilled, part-time worker. As demographic and economic pressures loom large, it becomes imperative for Japan to rely extensively on its migrant, female and elderly populations. To govern its social citizens in the future, the state must guarantee that social protection adequately addresses shifting family forms and realities. Contributing towards overcoming these complex challenges will enable Filipina immigrants to further extend their life projects as moralised, transnational Filipinas.

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Chapter 7
Labour Mobility from Eastern European Welfare States: Zooming in on Romania and Slovakia

Mădălina Rogoz and Martina Sekulova

7.1 Introduction

Throughout Europe, care is provided mostly within families, with public welfare provisions supporting and complementing these family efforts (Bettio and Plantenga 2004). Notions such as 'care deficit'[1] (Hochschild 1995) or 'crisis of care' (Triandafyllidou 2013) describe care deficiencies within both families and public welfare systems. In the last two decades, care deficits in Western Europe have been fuelled by demographic and social transformations, such as population ageing, changes in household structures (where nuclear families no longer live with their extended families), welfare programme reforms and an altogether lower involvement of the state in care provision (Leon 2014). These care deficits, particularly in high-income countries, have been addressed through, for instance, migrant labour which, in turn, contributes to increasing care needs in the migrants' sending countries.

Previous studies on care mobility and care migration[2] have analysed transnational care practices and transnational families, as well as the ways in which migrants informally re-organise family care obligations in their home countries

[1] A 'care deficit' is seen as the result of an increased need for care and difficulties in contracting a matching supply (Hochschild 1995).

[2] Following the UN definition of migration, which is a change in a person's place of residence for at least three months (UN 1998), the term 'mobility' implies fewer than three months of stay abroad.

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(Alpes and Van Walsum 2014; Bauer and Österle 2016; Escriva and Skinner 2008). Research on family migration found that caring responsibilities within migrants' families are constantly negotiated (Evergeti and Ryan 2011). This is, to a certain extent, described as the 'mobility of care' (Baldassar 2007), which implies that responsibilities develop over time and are also influenced by cultural expectations about caring obligations within families. Previous studies also showed that the ways in which migrants' families re-organise their care commitments in the sending countries are linked and, to a certain extent, depend on the care regimes there (Bahna and Sekulová 2019; Bettio and Plantenga 2004). However, less attention has been given to specific contexts of welfare provision in countries of origin, particularly with regard to the linkages between family care needs, cultural attitudes towards care and care workers' mobility (Rogoz and Sekulová 2019).

This chapter explores the re-organisation of care within families – caused by care workers' mobility – in the sending countries. It argues that what can be called a 'familialistic' orientation of relevant welfare policies in sending countries has an influence on labour mobility patterns. Through the case study of Romanian and Slovak live-in caregivers[3] working in 2- or 4-week shifts in Austria, the chapter analyses the linkages between care workers' strategies for addressing the care deficits of their families living back home, the deficiencies of related public policies in their respective countries of origin and the care workers' mobility patterns. It argues that, when it comes to the relationship between mobility and care needs, there seems to be a 'tipping point' in the needs of care workers' families which makes care workers decide to permanently return to their countries of origin in order to care for their family members. As care deficits in migrants' families emerge mainly in relation to children and elderly family members, we focus here specifically on childcare and care for the elderly. The remainder of this chapter unfolds as follows. First, contextual information is provided on care-work mobility, as well as on current public policies in the areas of childcare and elderly care in Romania and Slovakia. Second, the chapter's conceptual framework is laid out and the methodology employed briefly described. Third, the main body of the chapter addresses family care re-organisation due to care mobility, the effects of the family's care deficits and of welfare provisions of care on mobility and care re-organisation in families with a mobile carer. Finally, the last section draws the main conclusions and summarises the contribution's central argument.

[3] Live-in (24-h) care provision by migrant care workers represents a specific type of mobility/migration in Central and Western Europe. For more information about the specifics of live-in care work in Austria and its developments, see Österle and Bauer (2012), Sekulová and Rogoz (2019) and Winkelmann et al. (2015).

7.2 Family-Related Policies in and Care Mobility from Romania and Slovakia

In many Western European countries, families' care needs are increasingly being complemented through migrant work – be they citizens of other EU countries or third-country nationals. The main differentiating aspect of care-work mobility from other types of labour mobility lies in its over-representation of female migrants. For the purpose of this paper, 'care work' refers to all types of assistance provided to support the daily life of a dependant in a family setting, either in the carer's own family or as a remunerated assistant in the household of an unrelated dependant. In this sense, care work can be either indispensable (for young children, for the severely ill) or needed in order to improve the quality of life (such as supporting someone with a disability, depending on the degree of disability). Care work or the labour aimed at supporting family and household reproduction referred to by feminist scholars as reproductive labour, can entail a large array of activities – from domestic work to providing company for an elderly person who lives alone. The cultural framework of care, particularly in Eastern European countries, attributes the main responsibilities to women and thus the labour mobility involved affects family care capacities in countries of origin.

Care mobility from Romania and Slovakia to Austria is mainly economically driven and is encouraged by wage differences and limited labour-market opportunities in the two countries compared to Austria (Bahna 2014). Most live-in caregivers work in Austria in private households, in 24-h personal care for the elderly. Caregivers from Romania and Slovakia commute regularly[4] on a short-term basis between Austria and their respective countries of origin. According to our research, in general, Romanian care workers commute to Austria in 4-week shifts – usually working uninterrupted 4 weeks in Austria and then going back to Romania for 4 weeks. Slovak care workers commute on a 2-week schedule – that is, they work 2 weeks in Austria and then go back to Slovakia for 2 weeks. According to internal statistics from Caritas Austria,[5] the Romanian care workers in Austria are younger than the Slovak carers. Most of those from Slovakia are middle-aged women and only a few have children under 15 (Bahna and Sekulová 2019). Consequently, the unmet care needs in the country of origin emerge differently in Romania compared to Slovakia. While, in Romania, women's care-work mobility affects both childcare and care for the elderly, in Slovakia it dominates the area of elderly care.

In both Romania and Slovakia, paid parental leave for early childcare is available for the first 3 years, depending on a child's needs (Búriková 2016; MMJS 2016). In Romania, nurseries are available for children between 3 months and 4 years old (Monitorul Oficial 2009). While nurseries for children younger than 3 years exist in

[4] The circular mode of care provision has been determining care mobility to Austria since its beginnings, in the early 1990s, before the 2007/2008 legalisation on migrant care work (Österle and Bauer 2016).

[5] Shared directly with the authors in the framework of their research.

Slovakia, the widely accepted social norm is that young children are best cared for at home (Saxonberg 2011). Eastern European countries score the lowest in Europe when it comes to the use of formal childcare services for those under 2 years old. Thus, the share of children aged 0–2 in formal childcare arrangements was less than 20% in Romania and under 10% in Slovakia in 2012 (Plantenga and Remery 2015). According to data from Eurostat (2018), Romania and Slovakia also have some of the lowest rates of paid formal childcare for children below 12 years of age. In 2017, just 3% of children in Slovakia and only 1% in Romania received any form of paid formal care before they turned 12.[6] In addition, the states provide complex sets of financial support for children's education. In Slovakia, the core consists of child benefit (EUR 24.34 in 2019) paid monthly up to 18 years old or, if the child goes on to study at college or university, up until the completion of these studies or a maximum of 25 years old. At the same time, there is parental benefit (EUR 220.70 in 2019) paid monthly until the child reaches the age of three – or up to 6 years in particular circumstances (e.g. the poor health of the child, etc.).[7] Similarly, in Romania, all children (under 18 or, if older, until graduation), are entitled to monthly paid benefits of around EUR 31 for children aged 2–17 and EUR 62 for all children with disabilities[8].

Care for the elderly subscribes to provisions under the long-term care system, which comprises a complex range of health and social services for the elderly and/or persons with disabilities who are dependent on help with their daily activities over an extended period of time (Hirose and Czepulis-Rutkowska 2016). Most European countries do not define this as a separate social field (Spasova et al. 2018). In Romania, for instance, long-term care includes measures aimed at supporting the elderly and disabled (Council of the European Union 2014; Popa 2010), the responsibility for which is split between different levels of the administration – social-service provision falls under the responsibility of local authorities, with NGOs playing an important part, while the financing mechanism combines central and local resources. The social services available under long-term care are the following: homecare, care provided in day centres and care provided in residential centres (European Commission 2019). In Romania, there are no cash benefits for

[6] This Eurostat analysis is based on the EU-Statistics on Income and Living Conditions (EU-SILC) *ad hoc* module 2016 (Eurostat 2018). Paid formal childcare refers to childcare by a professional childminder at either the child's or the childminder's home: 'Parents are often employers and pay the carer directly; furthermore there are no controls over the qualification of the childminder by an organised structure. "Professional" childminder shall be understood as a person for whom looking after the child represents a job of work or paid activity. The term "professional" does not contain a notion of qualification or of quality of care. Babysitters and "au pairs" are also included here' (Eurostat 2017: 4).

[7] For details, visit the website of the Slovak Central Office of Labour, Social Affairs and Family: https://www.upsvr.gov.sk/socialne-veci-a-rodina-2/davky-pre-rodiny-s-detmi/prehlad-davok-pre-rodiny-s-detmi.html?page_id=696894. Accessed 14 September 2020.

[8] For details, visit the website of the Romanian Directorate-General for Social Assistance and Child Protection: https://dgaspc3.ro/servicii-dgaspc/ajutoare-sociale/copii-si-familii/alocatii-de-stat-pentru-copii/. Accessed 14 September 2020.

the informal care of the elderly, only for those who are officially recognised as disabled. However, if the person has been assessed as disabled, he or she can benefit from a care allowance granted to a member of the family (European Commission 2016a). While both public and private residential homes exist, these are either insufficient or too expensive (particularly the private ones). In order to access public residential homes, contributions by the general public increased from 26% of the total cost in 2012 to 30% in 2016 while, to access private residential homes, a person has to pay more than 70% of the cost (Pop 2018). Thus, long-term care for the elderly in Romania is provided mainly on an informal basis.

In Slovakia, the long-term care system consists of formal care services provided by professionals either in residential institutions (nursing homes, hospitals etc.) or at home (Council of the European Union 2014; Radvanský and Lichner 2013; Repková 2011). Municipalities are in charge of social services, as they have the main responsibility for the provision of community social-care to the elderly. Regional- and county-level administrations are responsible for residential services for the elderly and persons with disabilities. Private services are somewhat rare due to the low purchasing power of people in need of social and health services (Repková 2012). Formal care provision, both institutional and in private homes, covers around 14% of those who need care in Slovakia (Radvanský and Dováľová 2013). The long-term care system in Slovakia has four main clusters of carers: those providing care informally within their families (and receiving cash benefits to provide this care to a family member registered with the authorities), home nursing personnel (who are employees of municipalities or private providers), personnel in residential care facilities and volunteers. Informal carers (nearly 60,000 persons), mainly family members of those in need of care, may apply for a cash benefit (European Commission 2016b), provided through the network of local labour, social affairs and family offices (European Commission 2016b). Entitlement to these cash benefits is means tested and the claimant's income and assets cannot exceed a certain ceiling. As the income increases, the cash benefit is reduced (European Commission 2016b). Recently, the basic cash benefit increased significantly, from EUR 249.35 in 2018 to EUR 430.35 in 2019.[9] Officially recognised informal carers are, at the same time, insured (health and pension insurance) by the state and entitled to some public services which are marginally used (European Commission 2016b).

7.3 Concepts and Theoretical Perspectives

The extent to which informal care is provided by family members and the responsibilities which this entails differ significantly across Europe (Bettio and Plantenga 2004; Saraceno and Keck 2010). Informal care refers the most commonly to all

[9] For details, visit the website of the Slovak Ministry of Labour, Social Affairs and Family: https://www.employment.gov.sk/sk/rodina-socialna-pomoc/tazke-zdravotne-postihnutie/penazne-prispevky/pp-opatrovanie/. Accessed 14 September 2020.

unregulated, mostly unpaid activities to support children, elderly relatives or others, while formal care provisions can be defined as regulated by policies or other forms of contractual arrangements between individuals (Bettio and Plantenga 2004). In addition to the relationship between the carer and the person cared for, the setting is also important: care work provided within a household, by a family member to another family member – which is often but not necessarily unpaid – is also categorised as informal care. However, the concept of informal care is narrower than that of reproductive labour or unpaid work in a broad sense for it refers specifically to situations wherein the care is provided by a close family member, a relative or a close friend, often without a formal qualification for providing such care (cf. Repková 2012). In practice, the boundaries of situations described by these concepts are often blurred – some carers, as the example of Romanian and Slovak caregivers in Austria shows, may have vocational training in the field of care. In childcare, the concept of informal care refers to an array of activities carried out by members of the extended family in order to support children at home. The concept of formal care in this context, however, refers to formalised care services provided by professionals in residential care, day-care facilities, day centres or private households. Similarly, informal care for the elderly is provided by a family member, often within the same household, and often but not necessarily unpaid.

The literature on informal caregiving and the culture of care finds that its organisation differs between diverse national and cultural settings (Pharr et al. 2014). In addition, cultural norms and attitudes towards care influence the distinction between informal care provision and the utilisation of institutional frameworks. Although women remain the predominant caregivers, the extent and form of their involvement in family care depends upon cultural norms, family structures, social policies and welfare provision. Extended families where the members share resources allow greater flexibility in caring responsibilities. Typically, grandparents may provide care to grandchildren or adult daughters can share caring responsibilities for elderly parents. However, even nuclear families may still rely on extended family care resources while living separately – with one of the parents living abroad. A recent cross-country analysis of 35 long-term national care systems[10] found that, although over the last 10 years (2008–2018), there have been some changes in the distribution of caregiving tasks in general, 'women continue to take responsibility for and to carry out the bulk of caregiving' across Europe (Spasova et al. 2018, 30). A Eurobarometer report on health and long-term care in the European Union found that women were 'more often fully involved in informal care than men' – 47 vs 36% in 2007 (European Commission 2007, 83). The same report finds that 'women are slightly more likely than men to expect to have at least partly to give up paid work to care for their elderly parents in the future – 9 vs 6 per cent' (2007, 90). When asked about the best care option for an elderly person who lives alone, 56% of Romanian and 47% of Slovak respondents consider that living with one of their

[10]The synthesis is based on 35 country reports by the European Social Policy Network (ESPN) country teams, covering: EU member states, North Macedonia, Iceland, Liechtenstein, Norway, Serbia, Switzerland and Turkey (Spasova et al. 2018).

children is the best (European Commission 2007). More-recent studies show that, in Slovakia, social norms expect families to stay together and women to be responsible for family care (Bosá et al. 2009; Vol'anská 2016). Similarly, a study on long-term care found that, in Romania, most informal caregivers are women – as a rule wives or daughters (Popa 2010).

Existing studies underline the connections between the extent of informal care provision, general institutional frameworks and states' involvement in responsibilities in the area of care (Brandt et al. 2009; Verbakel 2018). From a state institutional perspective (Brandt et al. 2009), formal and informal care are complementary and an extensive welfare state – with wide support for care – may motivate family members to provide less-intensive informal care, where this latter is defined as care provided for a minimum of 11 h per week (Verbakel 2018). On the other hand, less state involvement may lead to family members providing more intensive informal care. According to Verbakel (2018), in countries with extensive long-term care provision, individuals are more likely to provide informal care, while the likelihood of intensive caregiving is lower. Countries with less state involvement have fewer informal caregivers but more intensive care is provided.

Care provision in terms of services provided to those in need of care and the general recognition of the role of the family depend on national contexts. The role of social policies and welfare provision with regard to care can be categorised on the familialism/de-familialisation continuum (Esping-Andersen 1990; Leitner 2003; Saraceno and Keck 2010). The differentiating indicator on this continuum is the presence of policies that explicitly support the family in its caring functions. At one extreme – familialism – family members are expected to remain responsible for caring for their relatives and the elderly in particular (Bettio and Plantenga 2004). According Saraceno and Keck (2010), familialism refers to policies which, usually through financial transfers, taxation and paid leave, support family members in keeping up with their care responsibilities. De-familialisation means the opposite, the when individualisation of social rights reduces family responsibilities and dependencies (Saraceno and Keck 2010) and, instead, makes the state responsible for welfare provision. The position on the familialism/de-familialisation continuum of welfare provision with regard to care, as the example of Romanian and Slovak caregivers shows, influences care workers' mobility patterns. Both Romania and Slovakia display a 'familialistic' (Österle 2010) long-term care system. Data from the 2016 European Quality of Life Survey (EQLS)[11] confirm that both Romania and Slovakia are among the countries with the lowest proportion of people using formal long-term care services themselves or having someone close who had used the service – with 3 and 2% of respondents, respectively (Eurofound 2017a). Although the number of public care homes increased considerably in recent years in both Romania

[11] The fourth EQLS was carried out from September 2016 to March 2017 in all EU member states and the five candidate countries (Albania, the former Yugoslav Republic of Macedonia, Montenegro, Serbia and Turkey). It was coordinated by Kantar Public, with local partners interviewing a total of nearly 37,000 people in 33 different countries, with sample sizes ranging from 1000 to 2000 per country (Eurofound 2017a: 9).

(by 30% from 2008 to 2014) and Slovakia (by 39% between 2004 and 2017) (Eurofound 2017b), the limited availability of residential services in the two countries contributes to the importance of care provided by family members.

7.4 Methods and Data

This paper draws on qualitative data from 60 in-depth, semi-structured interviews conducted in Romania and Slovakia between October 2017 and March 2018.[12] The selection of care workers was based on several criteria, among which the residing region in sending countries, working in care for the elderly abroad and having caring responsibilities for their own family dependants in their respective countries of origin (either children or the elderly) were the most relevant. Of these, 18 were semi-structured interviews with care workers and their adult family members, with a focus on the care needs of families and the use of care services delivered by private or public service-providers in the two countries of origin. This paper also draws on five additional, qualitative, semi-structured interviews with care workers in Slovakia and Austria – three Slovak and two Romanian – conducted outside the REMINDER project. These five additional interviews focused on the role of informal care in caregivers' families, the ways in which the provision of care was re-organised within the family and the cultural norms concerning women's role in this re-organisation.

7.5 The Needs of Care Workers' Families and Strategies Employed to Address Them

The rich body of literature on transnational care practices and transnational families has addressed the ways in which women re-organise family care obligations while working abroad (Alpes and Van Walsum 2014; Bauer and Österle 2016; Escriva and Skinner 2008). Many Romanian and Slovak caregivers who work in Austria have family care obligations at home – towards their own children and grandchildren, their own parents or other older relatives. Despite working abroad, they remain, to a certain extent, responsible for family care and continue to be involved in the decision-making processes in their families (Bauer and Österle 2016; Sekulová 2013, 2015).

[12] The data were collected mainly in the framework of a Horizon 2020 project REMINDER ('Role of European Mobility and Its Impacts in Narratives, Debates and EU Reforms'). The REMINDER project was part of a larger study exploring under-researched aspects of the social and economic implications of intra-EU mobility on the sending countries in the Eastern part of Europe. For more details visit https://www.reminder-project.eu/publications/work-packages/wp6-countries-of-origin/. Accessed 14 September 2020.

Like earlier findings (Bauer and Österle 2016; Sekulová 2013, 2015), where care workers have care obligations towards their own family members, we found that the re-organisation of care follows family ties whereby the husband/partner and grandmothers play the most important role(s) during the absence of the main caregiver. Family care is thus most commonly delegated, depending upon family type (nuclear, two-generational, kin-network nearby), to spouses, grandmothers or older children. Importantly, the delegation of care to other family members is only temporary, until the caregiver returns home (Sekulová 2013).

Caregivers referred to the need for financial resources as one of the main current problems for their families. The financial aspect is closely related to family care, as remittances are being spent on the different care-related needs of family members. For instance, Katarína, a caregiver from Slovakia, mother of three children, spends remittances from Austria on school-related expenditure such as study fees or student accommodation for her children. Some care workers, such as Helena (50) from Slovakia, may also provide support to adult family members with financial constraints:

> Now, when I leave for Austria, my son does not cook, so he eats at restaurants. The money I earn for care work I spend on basic family expenditure.

In the specific case of Romanian and Slovak care workers commuting to Austria, family care needs and the strategies employed to address them are determined by the short duration of caregivers' stays abroad, which typically range from 2 to 4 weeks in Austria and followed by an equal amount of time spent in their home countries. This mobility pattern enables care workers to take charge of a significant volume of family care responsibilities, as 47-year-old Katarína, from Slovakia, explains:

> [Because I return after two weeks] I take over the responsibility in the household for everything. But I must admit that my children make an effort to at least prepare the house before I come. They tidy up, wash the dishes, my daughter even irons. But it is automatic, that once I return home, everything lies on my shoulders. They help, but not intensively, and only if I am absent.

We found that, while the ways vary in which families cope with the mobility of the main caregivers, the family care needs of Romanian and Slovak caregivers working in Austria have a substantial influence on the care-work mobility project. Changes in a family's care needs over time, as the health situation of family members changes or the children grow up, determine the scope of the care worker's mobility. Family needs determine the caregivers' return home to take over emerging caring responsibilities, as the following chapter illustrates.

7.6 Care Needs as a Determinant of Mobility: The Tipping Point

Recruiting migrant caregivers from other countries as a strategy to cope with deficits resulting from one's own care migration – and known as care-chain migration – is not evident in the Slovak context (Bauer and Österle 2016; Búriková 2016; Sekulová 2013). Instead, we found that extensive family care obligations represent a constraint on mobility, as women with particular care obligations are less likely to migrate.

Our material suggests that Romanian and Slovak women only work abroad if their respective families do not suffer from a care deficit. If care workers themselves declare that a big part in their decision to return is played by the care needs of members of their families, then the absence of these care workers from their families begins (at least from a certain point onwards) to create a care deficit in the family. While care workers are abroad, families cope with their care needs as long as these needs are quite limited. In other words, there seems to be a tipping point in the care needs of care workers' families, which determines that care workers can no longer work abroad but must to return to their countries of origin to fulfil these duties. Thus, the women in our sample often started to work as caregivers abroad after their commitments to family dependants ended (after the parents or parents-in-law passed away, for instance). Similarly, their decision to permanently return home and no longer work abroad was often taken due to their family's new care needs.

Two Slovak carers whom we interviewed had been providing informal long-term care for their parents until they passed away and only afterwards did they start working as carers in Austria. In spite of the financial constraints due to loss of a wage during the time they provided informal care to their own family members, both considered it as unacceptable to work abroad and leave their parents without care or in state-provided residential care facilities. Diana took care of her mother for 5 years until the latter passed away. For Diana (49 years old) this was considered part of her duties as a daughter, even if this meant a difficult life period for herself. She did not consider resorting to residential care services – at that time largely regarded to be of poor quality and insufficient – even though her mother would have been eligible for them.

> After my mother passed away, I started [to work as a caregiver in Austria]. I was happy that I took care of her until she passed away [rather than placing her in residential care]. But it is a very sad and difficult story which I went through. The state did not help me in anything at all. Nothing, nothing, nothing.[13]

Maria, a 49-year-old woman from Slovakia, decided to return back to her home country to look after her mother, whose health had worsened:

> [For] two weeks I would live with my mother, helping her and spending time with her. When I went abroad, my sister would spend two weeks with her and look after her. In

[13] The care worker interviewed made reference here to both support in kind and cash support.

> September 2018, she got seriously sick and her health worsened. […] We discussed what to do and whether she would become dependent upon [the] care of other people. All this happened in December 2018. So, I decided to quit my job. At the beginning, I took unpaid leave from my work[14] and searched for opportunities to be employed as a full-time carer of my mother… However, my mother passed away in mid-January 2019. Therefore, in February, after a few weeks at home, I returned and since then I have been working as a caregiver in Austria normally [on the two-week rotational scheme].

Andrea, a 35-year-old care worker originally from the Republic of Moldova, is married in Romania, where she lives with her husband and their three children. While she works in Austria on a 4-week shift, her children are cared for either by her mother, her husband or her brother, depending on who is available at the time. Her husband works in Italy and comes home every 3 months. Her brother, who previously worked in Germany, was searching for a job at the time of the interview. One of the stories shared by Andrea shows that, although care is being organised and transferred to other family members, she remains heavily involved in care at home, particularly when extraordinary situations arise:

> Violence is really an issue in their school. When I returned home last time, my son was injured […] and he even needed specialised medical care… Because that took place while I was in Austria. And my mother did not know to go there [to enquire about the situation at school] … but [upon return,] when I saw that bruise on his hand, I went to the police and the police sent me to get a medical certificate [that he was hit]. And after two weeks [since the incident] he still needed to spend four days in hospital. … Sometimes we leave our children but even in schools they are not safe. … [The school] did not react in any way. The boy who hit him got a lower mark but nothing else happened. … My son no longer wants to go to that school and I decided with my husband to get him into another school.

Irina, 36, has been a care worker in Austria since 2013. Previously, she had been working in Romania but when her company started to have problems paying employees' salaries, she resigned and begun looking for intermediaries who could help her to find a job as a care worker abroad. She had no previous experience as a care worker in Romania. At the time of the interview, her two children – aged eight and nine – were living with her husband and parents-in-law while she worked abroad. In the event that her parents or parents-in-law need her to care for them, she has said that she will no longer work in Austria. However, as long as this is possible, she wants to keep the job. Her grandmother passed away last year but, in the final period of her life, the family employed a woman from the same village to take care of her. Irina is currently working 4-week shifts. She is considering moving to Austria with her husband and the two children.

Oana, A 25-year-old Romanian care worker, single mother of a 4-year-old, has been working for nearly 2 years in Austria. She had previously worked in the Czech Republic as a supply manager in a warehouse and in agriculture. After returning to Romania, she heard about care work from her acquaintances. She likes being a care worker. Her son is currently living with her mother, grandmother and brother. When

[14] As self-employed caregivers in Austria are not entitled to paid leave (as in regular employment), the reference here is to the fact that the family in Austria (the recipient of care services) used the services of another caregiver at that time.

Oana is in Austria and there is financial need in the family, her brother steps in. She plans to find employment in Romania to be closer to her family. When her mother and grandmother get older, she plans to leave her job in Austria and take care of them herself.

> One must find a way to do both [take care of home and work abroad]. But I like the work I am doing and I try to do everything at home as well. … The needs are many – I am a single mother, I raise my son by myself. And it is difficult. But things are better now. He is four and a half. …My son stays with my mother and my grandmother. Sometimes my brother is involved as well. Practically, my mother has been involved since my son was two weeks old, so that I can work to support the family. …My mother has diabetes and cannot work. Her medicine costs about 100 EUR per month and my grandmother has a very small, minimal pension. So, I must work… When I leave, it is very difficult. When I return home is the most beautiful thing but it is very difficult. To be a mother [and leave your child] is difficult.

In addition, caregivers may work abroad due to the care systems in their respective country of origin. In the Slovak sample, for instance, one woman was able commute to Austria due to the existing state-provided care services. Lena, 55 years old, divorced and mother of four children, one of whom had severe disabilities, said she needed a break and a change after she had been caring for her daughter for 17 years. Because of financial constraints and the need for a life change, she placed her daughter in a residential care home and left to work in Austria. Whenever she comes back to Slovakia for 2 weeks, she takes her daughter home.

> I was officially registered as a carer, by the Labour Office, of my own child. I did not have responsibility for more clients, only for this one particular person. My daughter. So the state paid me, the scheme had a title 'care for a relative' at that time... The income, however, was very low and it was impossible to pay the rent for a three-room apartment, expenditure on my children's education and other costs. Without a second part-time job, 4 hours per day, I would not be able to survive, to cover all the necessary expenditure. And, to be precise, we overcame these problems thanks to my parents´ financial contribution… So, I decided to try something else and try paid care abroad.

This life situation also reflects another aspect, where the state offers a universal scheme for families with a disabled member. However, the financial support is insufficient, so care work mobility, in this particular case, represents a coping strategy for the family's financial situation. In a context of social norms attributing care responsibilities to women and the 'familialistic' public-policy orientation in Slovakia, Lena's migration to Austria is possible as her family does not need intensive care. Her parents are in no need of care, as her mother is self-reliant and her father passed away. If the situation in the family worsens (e.g. her mother needs), Lena declares that she will perhaps stop commuting to Austria and return permanently to Slovakia, where she can find a job, although less-well paid (compared to what she currently earns in Austria) in order to care for her mother.

Another participant from Slovakia, 37-year-old Lucia, a mother of seven, works in Austria due to the availability and affordability of childcare services in her home town. Although her husband and relatives are taking over her responsibilities while she is abroad, she declares that she can work in Austria thanks to how kindergarten

and school are organised in Slovakia and also thanks to a nanny who has been helping her husband.

> My husband takes care of the children while I am abroad. For the youngest [11 months old when she started with care work] I hired a nanny. So, he took the youngest to the nanny in the morning, the older children to school and in the evening he collected them. They had all-day activities, after-school activities – such as music class or painting – then he took them home at five. I paid the nanny 10 euros per day.

In this case, care work in Austria financially complements Lena's husbands' wages and the state-paid child benefits, which would not be sufficient to cover the family's daily expenditure. Lucia is thinking of quitting care work in Austria as soon as the children turn 18 and are self-supporting or if another major need for care in the family arises.

As this section has shown, the interviewed families made use of public care services to different extents. Some did not utilise any services, either because these were not available or because the family was not interested in the rather unsatisfactory public support and declared that they relied on the family's care resources instead of searching for institutional support. According to cultural norms, elderly members of the family should continue to live at home, being cared for by family members. Placing an elderly family member in a residential home is seen as inappropriate. Similarly, Romanian care workers who participated in our research declared that there is a generational obligation for them to take care of their elderly parents.[15]

7.7 Conclusions

Mobile care workers circulate between their respective countries of origin and work, being 'here and there' without necessarily intending to settle in the country of work (Morokvasic 2013). This chapter has shown that, despite commuting to Austria to work in care, these women remain responsible for the organisation of care in their own families – which tends to be rather sporadic, temporal and limited. The carers we interviewed referred to the main care needs during their absence as being sustaining basic services in the household and reproductive labour for the closest

[15] A previous study on female care migration from rural Romania found that it led to shifting evaluations of institutional care. Through the particular example of two Romanian villages, Thelen (2015, 151) argued that 'the phenomenon of care migration to the West has changed perceptions of care institutions for the elderly', particularly with regard to institutional arrangements through which elderly people living alone are being cared for in their homes, with the support of the local community. Looking at a particular example of community-based elderly care, Thelen found that 'not sending the elderly out of their homes must be avoided, but they must certainly not be sent out of the village' (Thelen 2015, 152). As our research focused on care workers' strategies for addressing their families' care needs, we found that care workers feel responsible for caring for their elderly relatives. Furthermore, we found that, in addition to being their responsibility, care workers do not intend to place their elderly parents in institutional care.

family members such as children, partner/spouse or parents. The ways in which these needs are addressed, as our qualitative study has shown, are influenced by several factors – relationships between family members, family structure and type (e.g. nuclear family, extended family or double-generational family), length of shifts abroad, cultural norms and expectations towards women, spatial distance between family members' residences in the origin country and welfare provisions for care.

The high reliance of Romanian and Slovak care workers' families on informal care is also influenced by the cultural norms according to which the provision of care is the result of intergenerational solidarity and socially expected behaviour. Some narratives reflected on the strong social expectations. The mobile caregivers, the main carers in their families in the countries of origin, leave in order to undertake paid care abroad while the care needs within their families must be satisfied in different ways. The social construction of care and cultural values, together with gaps in institutional frameworks in the two countries, affect mobile caregivers' decisions. Care systems interfere with patterns of labour-market behaviour, including cross-border mobility. The examples in this chapter underline that, once the acute need for care for a family member appears, women no longer engage in care work abroad or they leave care work altogether and return home to take up their responsibilities caring for their own families.

Depending on the age of their children or the needs of their elderly parents left at home, the re-organisation of informal care within the family and accessing/utilising public services do not seem to differ in the two countries. However, the differentiating factors appear to be the time spent abroad and the commuting distance between their homes and the private homes where they work in Austria. We argue that the existing care needs in care workers' families facilitate this type of work; alternatively, mobility patterns influence the ways in which care needs at home are being addressed. Existing (limited) care needs that enable the reconciliation of family responsibilities and working abroad allow carers to engage in this transnational care work, as shown by the transnational care provision from Romania and Slovakia to Austria. The specific mobility pattern in the form of short-term commuting – 'back and forth' – enables carers to be involved in family care at home too. At the same time, women with extensive care obligations are less likely to migrate. As limited formal services put pressure on families to continue providing care informally, we argue that these institutional frameworks – particularly for childcare and care for the elderly – also influence care workers' mobility strategies.

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Chapter 8
Welfare Considerations Underpinning Healthcare Workers' Decision About Migration: The Case of Slovenia

Mojca Vah Jevšnik

8.1 Introduction

Slovenian public healthcare has historically relied on the immigration of healthcare workers[1] from former Yugoslavian republics such as Croatia, Bosnia Herzegovina and Serbia (Albreht 2011). After the country's independence in 1991 and the introduction of a restrictive migration policy for foreign nationals, shortages began to rise persistently. Slovenia counted on the supply of healthcare workers from the other European Union (EU) member states after joining the EU in 2004 but the realisation that they preferred to choose other countries with significant competitive advantages over Slovenia prompted a policy turn aimed at achieving self-sufficiency. The result was not entirely satisfactory for a variety of reasons that will be discussed further on; certain positions continued to remain unfilled, geographical imbalances in supply and demand persisted and discontent among an overburdened healthcare workforce began growing. Glances back towards the Western Balkan countries revealed that healthcare workers were now being heavily targeted by high-income European countries, some of which have adopted specific policy measures that make recruitment from third countries easier for employers (Lazarevik et al. 2016; Živković 2018). Many of the third-country nationals who did find employment in Slovenia used the country merely as a stepping stone, as the efforts to retain them failed in light of the better working conditions and remuneration offered to them in other countries. Different motivations prompted Slovenian healthcare workers to

[1] The chapter defines healthcare workers as all healthcare service providers, including physicians, dentists, nurses, midwifes, pharmacists and other providers who deliver personal and non-personal health services. The term does not include managerial and support staff, such as managers and planners, who are not engaged in the direct provision of health services.

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start looking for jobs abroad themselves, be they in neighbouring Austria, other EU countries or overseas. It became evident that, in the global labour market for healthcare, Slovenia was going to draw the short straw.[2]

This chapter explores a complex interplay of motivations prompting healthcare workers to emigrate from one welfare state to help to sustain another, focusing in particular on motivations related to social-welfare protection. It draws on different notions and conceptualisations of welfare. First, it understands welfare as subjective wellbeing, happiness, health and prosperity (Greve 2008) and the fulfilment of the essential needs of individuals and families in terms of having, loving and being (Allardt 1975, cited in Greve 2008, 55). Second, it understands welfare in terms of service provision and institutional arrangements by the state with the purpose of ensuring the social and economic wellbeing of its residents. The use of the concept of welfare in this chapter therefore encompasses a person's everyday life perspective and a societal macro-level perspective (Greve 2008). Given the fact that healthcare workers are themselves providers of welfare to those in need of medical treatment and care, the chapter also discusses the workers' ethical considerations about leaving patients behind on the one hand and the pursuance of the provision of healthcare in other countries on the other – in other words, it explores how the provision of welfare to others builds into workers' own imaginaries and feeds the rationale behind their decision to migrate.

The findings are based on an extensive literature review and in-depth semi-structured interviews conducted with 27 healthcare workers, including ten nurses, ten physicians and seven midwives, who all emigrated from Slovenia to take up jobs in healthcare abroad. Ten interviewees were men – aged 28–45 – and 17 were women, aged 23–52. Seven out of the ten interviewed men were physicians, whereas three were nurses. All interviewees had obtained a university degree in midwifery, nursing or medicine. Prior to emigrating from Slovenia, they all worked in Slovenian public healthcare institutions for at least 2 years. The interviews were conducted in Slovenia, the United Kingdom, Norway and Australia – and via Skype – in the period from 2015 to 2018 and lasted between 1.5 and 2.5 h. Data collection was primarily guided by curiosity about the extent of the welfare considerations of these highly skilled professionals when deciding to move abroad as well as by the underlying concern shared with Buchan et al. (2014) that healthcare-worker mobility and migration will continue to be a significant element in European healthcare labour markets and will have a strong impact on healthcare delivery across EU member states. Hence, data outlining the rationale behind individuals' choices to emigrate from Slovenia were also collected with the aim of contributing to the evidence base that feeds policy and informs strategic responses to healthcare workforce planning. The research was therefore concerned both with identifying the deeply embedded rationale and trigger factors that prompt the decision by healthcare workers to move

[2] Given the urgency of the topic, especially when taking into consideration that Slovenia has statistically one of the fastest-ageing populations of all EU member states, has one of the lowest physician densities in the EU (OECD 2017) and is not particularly successful in retaining its healthcare workforce and achieving sustainability, it is surprising that the issue has not received more attention in Slovenian migration and healthcare policy studies.

abroad and with exploring the remarkable impact on and consequences of ground-level subjective decisions on systemic and normative frameworks. In line with Vindrola-Padros et al. (2018), an important point of departure was the realisation that migration and healthcare are not only influenced by global and national policies and structures but are also shaped daily by the aspirations of and choices made by individuals.

The chapter first sets the context and then moves on to identifying some of the particularities underpinning the growing vulnerabilities of the labour market for healthcare in Slovenia stemming from the healthcare workers' choice to emigrate. It does so by focusing primarily on the struggle to achieve the sustainability of the healthcare workforce and maintain the high quality of public healthcare services in an increasingly vulnerable welfare state. It then moves on to exploring a wide variety of motivations prompting healthcare workers' emigration from Slovenia,[3] focusing in particular on the aspects related to the pursuance of subjectively defined welfare and wellbeing, welfare-state-provided social security and services and the welfare of new patients versus those left behind.

8.2 The Migration of Healthcare Workers

Healthcare provision is an integral part of a welfare state and its complex web of policies by which it intervenes in the operation of the market economy to reduce social inequalities (Bryant and Raphael 2018). The obligation of public healthcare systems operating within welfare states is to reduce differences in health outcomes between socio-economic groups and across geographic regions. To do so they need to work towards securing a steady supply and sustainability of qualified healthcare workers, since there can be no health without a workforce (Campbell et al. 2013). In other words, the provision of public healthcare depends heavily on the dynamics and functioning of the labour market for healthcare workers. Unfortunately, this latter is a particularly vulnerable structure and does not have the capability of adjusting to the dynamics of supply and demand with ease and rapidity. One of the main reasons for that is the fact that the reproduction of healthcare workers is a time-consuming and costly process (Plotnikova 2018). It takes several years to train a nurse and a decade or more to train a doctor. Investments in healthcare workforce education are therefore observed with a significant delay and in addition do not always result as planned. The stability of the workforce depends on many factors, including the levels of turn-over rates – which are often high due to heavy workloads, professional exhaustion, psychological pressures and low remuneration – and the ability to attract young graduates to take positions within specific specialties or take up work in rural and remote geographic areas.

[3] In some cases, the interviewees who emigrated from Slovenia did not stop at the initial country of destination chosen but continued migrating further. The analysis includes their narratives related to chain migration insofar as they are welfare-related and thus contribute to building the argument.

Shortages of healthcare workers are observed at the global level and are a persistent worry in both developing[4] and developed countries (Buchan et al. 2014; Plotnikova 2018; WHO 2016). It is estimated that European Union (EU) countries will face a shortage of one million healthcare workers by 2020 (European Commission 2012), while challenges in ensuring an adequate supply are set to persist in light of an aging population that requires more healthcare, a high percentage of the aging healthcare workforce who are approaching retirement and insufficient replacement rates (Matrix Insight 2012). The problem for individual countries within the EU is significantly exacerbated by the rise of cross-border mobility or commuting, as well as continuous emigration to popular destinations outside the EU, such as the United States of America, Canada, Australia and New Zealand. As these countries are themselves experiencing deficits, they are actively recruiting healthcare workers from abroad in an effort to fill the vacancies, prompting other countries to follow such a *modus operandi*. The emergence and development of global care markets in the context of globalising care economies (Yeates 2009) has thus created a cycle where countries with more competitive comparable advantages recruit from countries with fewer – and the latter recruit from countries further down the hierarchy. For example, when doctors from the United Kingdom move to the United States of America, they are replaced by doctors from Britain's former colonies or other European countries such as Germany which, in turn, recruits from Central and Eastern-European or Western Balkan countries.[5] Competitive advantage is, of course, a relative term as its definition depends on the aspirations of each individual healthcare worker but, mostly, it refers to high remuneration, good working conditions, opportunities for professional advancement and a better quality of life in general. Therefore, compared to lower-income, resource-strained countries, wealthier countries have more policy capacity to act and more means to invest – and are as such more successful in attracting healthcare workers (Glinos et al. 2014).

8.3 The Slovenian Case

Slovenia is among the countries that have historically relied on and benefited from the immigration of healthcare workers from abroad. Before its declaration of independence from the Socialist Federative Republic of Yugoslavia in 1991, Slovenia

[4] The World Health Organisation (WHO) estimates that a global deficit reached 17.6 million in 2013. The largest needs-based shortages are in South-East Asia at 6.9 million and Africa at 4.2 million. In relative terms, the most severe challenges are in the African region. Although the global demand in 2030 is estimated to decline overall by 17%, the African needs-based shortages are forecast to worsen (WHO 2016).

[5] It is estimated that, between 2012 and 2014, around 1700 physicians from Serbia, Macedonia, Albania and Kosovo left to work abroad (Lazarevik et al. 2016). The Bosnian Chamber of Medicine announced that, in 2016, about 300 highly qualified doctors left the country. This number does not include junior doctors who left immediately after completion of their medical degree. Germany is among the most popular destinations for the countries of the Western Balkans (Živković 2018).

was an attractive destination for healthcare workers from other Yugoslavian republics. Tit Albreht (2011) writes that physicians and dentists from Bosnia and Herzegovina, Serbia and Croatia were drawn to Slovenia because of three main factors: the chronic shortage of health professionals, the numerous opportunities for medical and dental graduates that resulted from those shortages and an expanding healthcare sector at a time of significant limitations in several other republics. In other words, while Slovenia was experiencing shortages, many other republics were experiencing an over-supply and new graduates encountered difficulties in finding employment. The three republics became the source of 80% of immigrant physicians and dentists in Slovenia. After independence, immigration came to a near stop due to the war erupting in the Balkans but the pace picked up again in 1995 (Albreht 2011). Although the trend was discontinued when Slovenia joined the EU and restrictive regulations relating to recruitment from third countries came into force, physicians from the republics of the former Yugoslavia still represent the highest share of foreign physicians today. According to the Medical Board of Slovenia, 524 registered physicians with foreign citizenship currently work in the country, of whom 187 come from Serbia, 96 from Croatia, 82 from Macedonia, 47 from Montenegro and 42 from Bosnia and Herzegovina (STA 2019).[6]

Because it was relatively easy for Slovenia to recruit from the former Yugoslavian republics, no active policies to attract healthcare professionals were introduced immediately after independence. As the opinion was that any shortages were only temporary and the evaluation of needs was based mostly on a retrospective impression, the intake of students remained limited and no new medical or nursing schools were established. However, shortages continued to persist in the period between 2000 and 2004. The Ministry of Health reacted by announcing its intention to recruit more healthcare workers from abroad but Albreht (2011) notes that this intention never materialised because of two main factors: diverging views on the topic among the key stakeholders in the newly established state – i.e., the Ministry of Health, the Health Insurance Institute of Slovenia and professional Chambers – and the limited interest of foreign healthcare workers in taking up jobs in Slovenia. Slovenia was not an attractive destination for healthcare workers from EU countries, who preferred to seek employment in the old, high-income EU member states. In the absence of favourable recruitment policies and incentives and due to restrictive policies relating to the immigration of third-country nationals, workers from the Western Balkans increasingly turned to those countries as well. Restrictiveness can be partly linked to the politics of the nation-building process that sought to establish and reaffirm Slovenian identity based on ethnic origin and as such viewed immigration, especially from third countries, as detrimental. Another reason can be found in the organisation of the Slovenian health professional regulatory system, which is decentralised and gives substantial power to the independent professional organisations

[6] At the end of 2017, the overall number of physicians employed in Slovenian healthcare facilities was 6408 (NIJZ 2018).

called Chambers, which have their own specific interests when it comes to healthcare workforce planning (Albreht 2011).

The realisation that foreign healthcare workers will not be able to fill the shortages came after two important studies had laid out the projections for the supply and demand of physicians and nursing staff in the near future (Albreht 2002, 2005; see also Albreht and Klazinga 2002). In response, Slovenia attempted to move towards self-sufficiency by opening an additional medical faculty and five additional nursing schools, as well as by significantly increasing student intake in the two medical faculties. This resulted in an increased supply although self-sufficiency has not been achieved and shortages persist. Hospitals and primary care centres, primarily those in remote and rural areas, continuously warned that the system was at a breaking point as vacancies were not being filled. In 2011, an intervention law was passed for the recruitment of healthcare workers from third countries, which was successful in attracting a foreign workforce but did not stop the downward spiralling – and frustrations grew stronger. Although many recruited healthcare workers did settle in Slovenia, a substantial number used the country as a stepping stone to employment in other EU countries (Zupanič 2011). In addition, Slovenia-trained healthcare workers also increasingly started looking for jobs across the border, with some opting for settlement in other countries and others commuting to neighbouring Austria, where salaries are higher, working conditions are better and the workload is manageable (Fajnik Milakovič 2018).

According to the Nurses and Midwives Association of Slovenia, most Slovenian hospitals were experiencing shortages of nurses and midwifes in 2018. In the University Clinical Centre Ljubljana (UKC), the biggest Slovenian hospital, the shortages totalled 10% or 340 nurses while, in peripheral areas, the percentage was significantly higher. In Sežana, for example, 43% of vacancies remained unfilled while, in Šempeter, the figure was as high as 54% (RTV SLO 2018). In all Slovenian hospitals the shortage of nursing amongst midwifery staff is estimated to be over 2000 (Jager 2018). The mobilisation of retired nurses and paid overtime were the main strategies put in place to cope with the workload as vacancies continuously remained unfilled, leaving nurses burned out and under immense psychological pressure. In UKC Ljubljana, one third of the intensive care unit was closed down in 2018 as nine nurses resigned and the management could not replace them. In the same hospital, critical shortages of nurses and physicians were reported in several departments, including children's intensive therapy, cardiology, cardiovascular surgery, pulmonology, otorhinolaryngology, orthopaedics, dialysis, transplant medicine, emergency medicine and the intensive care unit (RTV SLO 2018). In the second-largest university hospital in Maribor, over 80 vacancies for medical specialists remained unfilled in 2016. Only one radiologist was employed in the oncology department and when she started her maternity leave, radiation treatment for new patients had to be suspended. The gynaecology department could not fill 16 vacancies, anaesthesiology 13 vacancies and the urology department was so severely understaffed that four burnout specialists resigned in protest. In the past couple of years, 70 physicians left the hospital to work either in other medical facilities in Slovenia or abroad or because they were due to retire (Seršen Dobaj 2017), leaving

behind a depleted system. Community-level healthcare centres across the country have also been overburdened for years. Family medicine specialists, gynaecologists and paediatricians are in short supply in most regions. The breaking point was reached in the first half of 2019 when, in the cities of Nazarje and Kranj, family physicians collectively resigned due to caseload quotas, which they claimed left them burned out and patients at risk (Jager 2019; Kos 2019). In Kranj, the number of physicians who resigned was 23 out of 34, which had an immediate impact on the 40,000 patients and family doctors across the country have declared that they will follow their colleagues' lead if conditions do not improve.[7] Public healthcare seemed to have ended in intensive care and the discussion among healthcare workers about the possibilities of commuting or emigrating abroad intensified.

How many healthcare workers actually leave Slovenia to find employment abroad is not entirely clear. The Statistical Office of Slovenia does not systematically follow the number of Slovenian citizens abroad and bases its estimations on the data derived from the Central Population Register kept by the Ministry of the Interior.[8] It also does not have comprehensive statistics on the number of emigrated or commuting healthcare workers (e-mail correspondence with Statistical Office of Slovenia, 12 March 2019). Estimates can be made based on the issued certificates of good standing which healthcare workers need to obtain from their professional chambers in order to apply for jobs abroad. The Medical Board of Slovenia has been issuing between 200 and 300 certificates on a yearly basis from 2013 to 2018 (Benedičič 2019) while, in the past couple of years, 420 nurses requested the certificate (Fajnik Milakovič 2018). However, these data do not indicate whether or not the person emigrated. Excluded from this proxy are also graduates who leave immediately after graduation or those whose employer did not request the certificate. The frequency of commuting to neighbouring countries has also not been statistically recorded although, based on the data collected through empirical research, the number of daily commuters is substantial. The geographical proximity of the Štajerska and Koroška regions to neighbouring Austria, which is experiencing major deficits in its own healthcare workforce,[9] makes Austria one of the most convenient destinations

[7] There have been insinuations, based on the content of trade unions' internal correspondence with their members, that mass resignations are a collective mutiny of Slovenian primary-care physicians who, in this way, aim to set in motion the privatisation of primary healthcare (Jager 2019). Since this issue is not the immediate focus of this chapter, it will not be elaborated upon.

[8] The Central Population Register contains information on the citizens of Slovenia who are absent from the country for more than 3 months, either permanently or temporarily (Stropnik et al. 2014). Information on emigration flows and stock are derived from data on permanent residence deregistration and combined with data on the resident population. According to the Statistical Office of the Republic of Slovenia, 9900 Slovenian citizens emigrated from Slovenia in 2017.[13] Most of them left for Austria (25%), Germany (19%), Switzerland and the United Kingdom. The negative net migration of citizens of Slovenia was recorded for the eighteenth consecutive year (Razpotnik 2018).

[9] According to the Austrian Medical Board, Austria has been losing an astounding 600 graduate physicians per year to other countries. Due to the high retirement rate, emigration and an increased demand for healthcare services, the Board estimates that they will need to fill 938 vacancies on a yearly basis in the near future. In 2017, 1665 senior students were set to graduate but, since an

for commuters as well as settlers. Data on intermediary or final destination of healthcare workers have also not been systematically collected, which additionally reveals a significant niche in research on the migration of healthcare workers from Slovenia. Data on yearly outflows, however, are scarce or non-existent in most European countries. The information base on healthcare workers in Europe has, in general, been described as 'patchy, of limited quality and outdated' (Maier et al. 2014, 95).

8.4 Spectrum of Motivations for Migrating

Several factors impact on healthcare workers' decision on the location of their employment. According to the OECD Health Working Paper No. 69 on geographical imbalances in doctor supply and policy responses (Ono et al. 2014, 15) these include: (i) the general attractiveness of the locational environment, including educational opportunities for children, career opportunities for spouses, housing etc.; (ii) the mode of employment; (iii) the income potential, i.e. payment schemes; (iv) the working conditions, including working hours, access to appropriate medical equipment and support services, challenging patient populations and professional development opportunities; (v) issues of prestige and recognition; (vi) the expectations of work and life in remote regions and the capacity to adjust to the environment. Glinos and Buchan (2014) propose an alternative typology, one that adjusted to the rationale for emigration in the context of European countries. They put forth a typology that identifies six types of mobile health professional based on their motivations for and purpose of migrating, conditions in the home and destination countries, personal profile and the likely direction of the move and length of stay abroad. They distinguish between the livelihood migrant, the career-oriented migrant, the backpacker, the commuter, the undocumented and the returner. In sum, the livelihood migrant moves to earn a (better) living, the career-oriented migrant travels to develop his or her career, the backpacker works to travel, the commuting migrant commutes across borders to work, the undocumented migrant is migrating for work unofficially and works in the informal sector and the returner migrates in reverse. The authors acknowledge that the categories sometimes overlap and that the mobile health professional can evolve from one type into another but, nevertheless, promote the categorisation by arguing that 'each (arche) type translates into specific advantages and difficulties for data collectors and policy-makers' (Glinos and Buchan 2014, 136). A noticeable absence of welfare concerns as a reason for emigration permeates this typology – be it concerns for their own welfare or concerns for the welfare of those to whom they will provide services.[10]

estimated 40% of graduates leave Austria to work abroad on a yearly basis, the deficit is likely to persist (Kordaš 2019).

[10]The category of the livelihood migrant does mention the better living standards of the migrant and his/her family as an encouragement to leave but this refers to the economically related advantages and job security.

The empirical research on the motivations of healthcare workers for emigrating or commuting from Slovenia to other countries revealed a somewhat similar rationale to that laid out by Glinos and Buchan (2014) but has, in addition, exposed a number of more-deeply embedded reasons, motivations and aspirations for migrating. In line with a number of other similar studies (Young et al. 2014) this one, too, confirmed that very few respondents explain their decision to migrate in terms of one single reason. A unique combination of push and pull factors was described by each respondent, in most cases spanning macro, meso and micro levels.[11] The analysis, however, focused in particular on motivations related to their subjective welfare and wellbeing, welfare-state-related provisions and the welfare of their patients.

8.4.1 Subjective Wellbeing

Subjective wellbeing is a social indicator and a welfare measure (Fischer 2009). It is the most often defined as a person's cognitive and affective evaluations of his or her life, which include emotional reactions to events and cognitive judgements of satisfaction (Diener et al. 2002). The concept includes experiencing pleasant emotions, low levels of negative moods and high life satisfaction (Diener et al. 2002). An important component of the concept of life satisfaction is job satisfaction, which is defined as the positive feelings of individuals towards their job (Gaszynska et al. 2014). The factors influencing the level of job satisfaction include salary, working conditions, recognition and responsibility (Gaszynska et al. 2014). In light of the current condition of the Slovenian healthcare system, most interviewees stated that their motivation to look for jobs abroad stemmed largely from their poor working conditions which led to stress, fatigue, anxiety and burnout but also from an indecisive and ambiguous workforce management and poor remuneration. These factors have contributed, in their opinion, to lower work and life satisfaction, quality of life and overall wellbeing, as Physician 3, who migrated to Germany, recounts:

> I was longing for better management, more opportunities for professional growth, more constructive interaction and cooperation with other specialists. The promise of a better salary was definitely a welcome bonus. I was getting little satisfaction from my work and that was very disappointing for me. I was feeling tired. Bad-tired, not good-tired.

Eight out of ten nurses interviewed stated that they feared they would make a mistake leading to fatal consequences because their unit was continuously understaffed and they felt fatigued, emotionally drained and disorganised. They all believed that they deserved better pay as well as more respect from the physicians and human-resource-management department. Two nurses who migrated to

[11] The macro level includes (national) economic and socio-political factors, the meso level includes profession-specific factors (for example, education, training, work conditions and career development) and the micro level includes 'individual circumstances and attitudes through which macro- and meso-level drivers are viewed but which also influence migration decision-making in their own right' (Young 2011, 314).

Slovenia from Macedonia and Bosnia and Herzegovina strongly felt that they were not respected within the medical team due to their foreign diploma, ethnic origin and accent, which was thus an important motivation to look for jobs outside Slovenia. Two midwifes who emigrated from Slovenia to the UK and then onwards to Australia also expressed their dissatisfaction with the way other medical staff treated them in the UK. It was the little things with a strong symbolic message, such as continuously mispronouncing their names or making jokes about their accent, as Midwife 1 said:

> I constantly had to remind them that my name (Jelena) is pronounced Y-elena and not J-elena, that I'm from Slovenia not Slovakia and that I don't speak Russian but Slovenian. It didn't bother me that much in the beginning, but after a few years the frustrations grew and I felt disrespected. I left because of things like this. Not feeling accepted, not being respected.

The last straw for many interviewees was a gesture or occurrence that they subjectively perceived to be disrespectful. One doctor claimed that it was yet another request by the Medical Insurance Institute to check his patients' records in search of fraud committed by him or his staff. For one junior nurse, Nurse 1, who migrated to Austria, it was a refusal by the management to provide her with a parking space or cover her parking costs, which were significant due to her frequent overtime and double shifts.

> I spent a tremendous amount of money on parking and I was on a minimum wage. The car park next to the hospital was too expensive for me to use, so I tried to park on the street somewhere close to my ward. I had to leave home early to find a spot and I was always struggling with this because the hospital is in the very centre of the city. The problem was also that I needed to renew the parking ticket for street parking every few hours. Since I couldn't manage to do that every day I got a bunch of fines. I work at a retirement home in Austria now and I have my own parking lot right next to the entrance.

For another young nurse it was the constant lack of eye contact with the doctors on her ward, making her feel disrespected and unappreciated. The lack of teamwork was the last straw for a young female physician as well, who said she found a position in Switzerland days after applying and left as soon as all the arrangements were made. When asked if her overall wellbeing has improved as a result of this emigration she responded that it has – not only because of her better relations at work but also because of the better work–life balance and higher socio-economic status. For all respondents, the promise of increased personal wellbeing was of paramount importance when contemplating migration.

Apart from work-related subjective welfare, the decisive factor for many interviewees was the possibility of embracing a desirable lifestyle, be it linked to a preferable climate, cuisine or cultural scene, to opportunities to pursue hobbies, to an affinity to live in a culturally diverse society or simply to a desire to embrace a mobile lifestyle. As Midwife 4, who migrated to Austria, the UK and Canada reveals, experiencing 'the romance of crossing borders' Doerr and Davis Taïeb (2017) for them went hand-in-hand with the pursuit of subjective welfare and wellbeing.

> I always wanted to travel and I chose this profession because I knew it would enable me to go places. I've been working in Austria, the UK and Canada and had short placements in South Africa and Australia. I took every job opportunity that presented itself, even if it was not paid well. I wanted to lead a cosmopolitan life, I wanted to make friends with people around the world. I was never concerned about the safety net. I knew I would always be able to earn a living.

Nurse 5, who migrated to Australia, also states:

> I left Slovenia because I was stigmatised for being gay. I felt I could not pursue my desired lifestyle there. I realised that I was leaving behind my safety net – family, social security, good public services. That made me a bit nervous. However, in the end it was my happiness that mattered the most and I gave it priority over guaranteed social security.

These narratives are in line with the findings of an extensive research project conducted by Papademetriou (2013), which determined the most important variables influencing high-skilled migrants' choices of destination. These include, among others, attractive lifestyle options, a healthy environment and a tolerant and safe society. All those factors were emphasised as important by a majority of my respondents in terms of contributing to their wellbeing.

8.4.2 Social Welfare Benefits and Services

The aspect of emigrating in order to benefit from better or more-generous social-welfare protection was not brought up as a decisive factor. All the respondents were confident that they would always be able to secure employment with their level of skills and that they would not have to reply on social benefits provided by the state. In other words, contrary to Borjas' (1999) welfare magnet hypothesis, according to which individuals' migration decisions are influenced by the generosity of the welfare system in the country of destination, respondents such as Physician 5, who migrated to the US, ruled out the robustness of the welfare state as a decisive factor for migration:

> The Slovenian welfare state is not bad. Maternity leave is long and well-paid, the primary, secondary and university-level education system is free of charge and public healthcare is free at the point of entry. It's true that social transfers seem to be in decline and the healthcare system is facing tremendous challenges but the country is still providing a very decent safety net. When I decided to move to San Diego I realised that the situation was going to be very different. However, it never occurred to me that I would not take a job here because the welfare provision is poor, just as it would not occur to me to take a job in Norway just because they have a generous welfare system.

More than state-provided support, healthcare workers contemplated the social benefits which are part of the employment-quality dimension. In line with Wiskow et al. (2010) and Muñoz de Bustillo et al. (2009), who argue that contractual relations that allow for pension schemes, flexible retirement policies and childhood provisions are important factors influencing job quality, my respondents considered in-job benefits as a significant motivational factor. Many have been impressed by

the policy of providing free childcare and housing at least during a transitional period following immigration, which has certainly facilitated their decision to emigrate and settle down. Quality professional development programmes – i.e. the programmes that healthcare institutions provide for their employees in order for them to evolve professionally and personally – were also brought up by a number of respondents as an important incentive. These programmes vary significantly but often provide free-of-charge psychosocial support and counselling as well as training in how to cope with stress and anxiety.

Welfare-state-provided services such as healthcare, social care and education were nevertheless considered by some respondents as an important incentive, especially by those who had dependent members in their family and considered access to quality education and public services to be an important factor when choosing the destination. This is in line with Buchan et al.'s (2006) research on international nurses in the United Kingdom, which revealed that education opportunities for children are one of the main motivators for moving, as Nurse 2, who migrated to the UK, explains:

> It's good to have a safety net, especially if you're in precarious employment. However, that's not the case with healthcare workers. We are in demand everywhere. I don't care about the generosity of social transfers in destination countries. However, when I was looking for a job abroad, I was googling public schools for special-needs students and social-care systems because my child has a developmental disorder. It was important for me to move somewhere where quality schools and public services would be provided.

8.4.3 Patients' Welfare

Healthcare workers who migrated to untypical destinations, such as India and remote Australian territories, spoke about a different rationale behind the decision to emigrate. For them it was mostly the urge to put their skills to good use in socio-economically disadvantaged environments and contribute to reducing health inequalities; however, many of them also felt the need to go back to grass roots and practice medicine without the use of sophisticated equipment and the pressures of bureaucracy, as Physician 1, who emigrated to the UK and India explained:

> I felt like a machine for issuing prescriptions and referring patients to specialists. I did not feel like a doctor at all. It was not easy to find a placement in India but I eventually moved there and found work in a small local hospital in a remote area. It was very exciting to actually be able to practice medicine, to use my hands and my brain again, especially when encountering difficult cases. It was such an authentic experience.

For the healthcare workers, the need to help others was, in many cases, coupled with a strong urge to find comfort and feelings of self-fulfilment, a desire to be part of a close-knit community, to be appreciated and respected. These motivations for migrating were revealed by Malkki (2015) in her portrayal of international aid workers with the Finnish Red Cross and their need to alleviate their own neediness. In her book, she argues that their intense personal and professional engagement

with the world has become a way of losing themselves while paradoxically staying vitally alive. Aid workers are thus not portrayed by Malkki as self-sacrificing individuals performing heroic acts but, rather, as persons seeking to alleviate their own need to travel, give, help and be part of something bigger than themselves. The narratives shared by my respondents – here, Midwife 3, who went to the UK and Australia – are strongly aligned with this line of argumentation.

> My children left for university and I felt a sudden loss of purpose. It was definitely a very persistent case of empty nest syndrome. I wanted to change the scenery, I wanted to lose myself in work but, most of all, I wanted to feel needed again. I took a job at a community-style healthcare centre in remote Australian aboriginal territory. I managed to overcome my personal crisis by immersing myself in work and helping others. I felt like I was going back to the roots of midwifery and it felt great. I was invited to peoples' homes and to their celebrations. I feel so happy that I took on this profession. It enabled me to move around the world and made me feel significant.

When asked how they felt about their patients left behind, the discussion turned to contemplating the ethical dilemma of the desire to move and the duty to remain. This issue is particularly controversial because it is causing a conflict between two sets of human rights: the right to health of patients in source countries and the right to the freedom of movement of healthcare workers. Alkire and Chen (2006) are among the most prominent scholars to acknowledge and throw light on this conflict. They argue that healthcare workers are themselves a locus of human rights that are to be protected, such as freedom of movement, the right to development, safe working conditions and a living wage; however, they argue that they are also a crucial instrument of the very health care to which others in a population have a right. In regard to this dilemma, some respondents noted that they struggled with guilt after moving abroad. They noted that they were the building blocks of the Slovenian healthcare system and that their emigration may have weakened healthcare delivery in their town or region. Other motivations prevailed, nevertheless, over the sense of patriotic obligation or obligation towards the state as a funder of their education, as Physicians 5 and 9, who moved to the US and Switzerland respectively, reveal:

> I was once told that I should be ashamed of myself for leaving our own to take care of others. That I should be ashamed of taking money from the taxpayers to get my degree and then deciding not to serve the very people who paid for my education. However, it was that very system that was actually pushing me to move abroad. My choice to move abroad was not because of the incentives from the foreign countries that would pull me towards them. It was because I was pushed away by poor workforce management, an overly hierarchical structure, a lack of respect from supervisors in my hospital and a tremendous level of machoism that I could no longer take.

> I was very emotional when I decided to leave my patients behind. At some point I contemplated if what I was doing was ethical. I asked my supervisor if he had found a good replacement for me and he told me not to worry, everyone is replaceable. I asked him if they would be recruiting new physicians from the former Yugoslavia and expressed my worry over recruiting from Serbia and Bosnia and Herzegovina because I knew they were lacking doctors and nurses there as well. However, I don't think he was bothered with the ethical issues of recruitment at all.

This dilemma has been discussed thoroughly by Shah (2010), who points out that opinions diverge considerably about what an ethical response to the international migration of healthcare workers would be.[12] There is ambiguity about the moral obligations of governments, individuals and health systems and the roles that global institutions should play. There are also apparent conflicts between the human rights of different parties and proposed responses can themselves appear discriminatory in the light of conflicting stakeholder interests. In practice, however, beyond ethical and policy conundrums, a relentless urgency surrounds the problem of the accessibility of health facilities and services if healthcare workers decide to emigrate in substantial numbers from the very welfare states of which they are the building blocks. The problem is exacerbated further when a country does not have any significant comparative advantage in relation to other recruiting countries that are experiencing a deficit of healthcare workers themselves.

8.5 Conclusions

The healthcare sector is considered and governed as a public service and is part of the welfare state in many countries of Europe and elsewhere. This means that governments have a responsibility to their citizens to provide healthcare (Glinos and Buchan 2014). In this chapter we have seen that Slovenia is committed to sustaining quality public healthcare but has been facing challenges in many areas, including healthcare workforce management. For a variety of reasons discussed in this chapter and due to the fact that healthcare as a welfare service is subject to global market forces and the globalisation of reproductive labour (Yeates 2009), Slovenia has been continuously struggling to achieve the sustainability of its healthcare workforce. It was argued that the Slovenian market for a healthcare workforce is particularly vulnerable because it is targeted by other countries, some in close proximity, that have significant competitive advantage over Slovenia in terms of providing better remuneration and working conditions. At the same time, historically established patterns of labour recruitment from Western Balkan countries were disrupted by strong incentives introduced by higher-income countries. While a turn towards sustainable healthcare workforce planning has been observed in recent years, the results have not yet been satisfactory and shortages continue to persist.

Poor strategies for workforce planning and retention are seen as one of the key reasons for emigration (Plotnikova 2018), which seems to be the case in Slovenia as well. When coupled with the demographic challenges which the country is facing, it becomes evident that firm policy action is required to mitigate the negative effects related to emigration and high turn-over rates. However, the vulnerability of the labour market for healthcare is exacerbated by the fact that the motivations for

[12] Although some soft regulatory mechanisms are in place, such as the WHO Global Code of Practice on the International Recruitment of Health Personnel (WHO 2010), their implementation is challenging due to the insufficient engagement of key policy decision-makers (Siyam et al. 2013).

healthcare workers' emigration vary significantly, which makes policymaking and healthcare-workforce planning challenging. As Plotnikova (2018) notes, policies are 'not always attuned to the individual creativity and imaginaries of health workers that ultimately affect their mobility' (Vindrola-Padros et al. 2018, 7). Migration as a physical movement is always accompanied by internal phenomena, the so-called inner negotiations in which people engage as they consider and employ mobility as a resource in their search for care and caring (Pfister 2018), welfare and wellbeing. Specific incentives may therefore either be a success with some healthcare workers or a failure with others. Some respondents participating in the study, for example, decided pragmatically to study medicine or nursing because they knew that these professions are in high demand globally and would, at some point, enable them to pursue a desired lifestyle outside Slovenia. Better management and remuneration might not, in their case, play an important factor in their decision to move abroad. Moreover, motivations to migrate change with age, vary according to life stages and are affected by unique life situations and desires. Thought processes and emotions that guide and affect the decision to migrate are always dynamic and perpetually evolving processes. At some stage in their lives, healthcare workers might be attracted by the prospect of low-cost housing, childcare or other job-related benefits offered to them while, at some other period in their life, they may be drawn by the need to provide care to disadvantaged people in poor regions or countries. Their narratives illustrate how unpredictable and intangible ground-level decisions to emigrate may be and what substantial effect they have on healthcare planning, provision and, subsequently, public health. That said, it should also be noted that the vulnerability of the healthcare sector, in terms of being constantly understaffed and under strain, should be perceived not only as a consequence of emigration but also as a cause. The relation between the two factors should therefore be conceived as circular.

Another finding stemming from this empirical research is that the generosity of social benefits in destination countries is not a decisive factor for healthcare workers emigrating from Slovenia. This can be attributed to the fact that most of the respondents considered the Slovenian welfare state system as relatively generous in itself and to the firm conviction that their perpetually-in-demand profession is their most valuable and trusted financial safety net.

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Chapter 9
When the Expatriate Wife Returns Home: Swedish Women Navigating National Welfare Politics and Ideals of Gender Equality in Expatriate Family Migration

Catrin Lundström

9.1 Introduction

> All the injustice, all the women without pension when they return, for example, with husbands who may have left them, without a cent when they return, who raises those questions? […] These are the people folks want to forget. And many perhaps think that they have spent... that they have had a luxurious life. […] And perhaps some of them had (Elise, 70 years old).

Social insurance services provided by the Swedish welfare state are primarily based on the contribution of the individual in terms of income and taxation. Such duties and obligations tend to be implicit in the idea of the citizen, further constituting the foundation of 'the Swedish model', including 'the gender equality contract', implemented in Sweden from the 1970s onwards (Hirdman 2002; Lundqvist 2015). Even though the period of 'the great reforms' stems from the 1930s, it was the expansion of a strong public sector – comprising the parliamentary decision on individual taxation in 1971 (within the sphere of the family), subsidised child care, paid parental leave, a national health insurance system and the redistribution of social benefits and rights during the 1960s and 1970s – that paved the way for women's entrance into the labour force (Lundqvist 2015).

These foundational pillars of gender equality in Sweden rest upon rights and responsibilities relative to the welfare system, nurturing an ideal in which (men and women in) the dual-career family share responsibility for care and household work. The same premise characterises the political discussion at large – dealing with the possibilities for women (rather than men) to combine work and family – often with the point of origin in mothers' (and, to a lesser extent) fathers' life puzzle in a heterosexual family, which constitutes the ideal type for gender equality policies in

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Sweden (Bäck-Wiklund and Bergsten 2010; Lundqvist 2015; Nordenmark 2004). Because of the strong dual-career ideal, there are virtually no discussions about the situation for women whose lives happen to be structured differently.

This chapter is based on interviews with former expatriate wives who returned to Sweden after living as 'trailing spouses' abroad. It asks how they navigate Swedish norms of gender equality in policy and practice upon return. The aim is to discuss how the women's narratives of political and practical ideals formed around work, gender equality, dual income and pension all intersect – and sometimes conflict – with notions and idea(l)s of gender, Swedishness and heterosexuality. It is argued that their experiences of expatriate life are related to questions of national identity, gender dependencies and disadvantages in terms of welfare for the women.

Starting from Elise's question (above) about the situation for returning expatriate wives without 'a cent when they return', the chapter discusses the socio-political consequences of the women's economic situation and their gendered dependency, in terms of welfare state policies of redistribution and pension issues. Though it would be utterly incorrect to compare this group of expatriate women with poor pensioners in general – since the women in this study often had access to significant resources such as property, family assets and social capital – their stories do shed light on an existing gap for both migrants and women in general in the Swedish welfare state.

In this manner, questions of emigration and immigration are highlighted, as are issues involving citizenship and gender in relation to equality, welfare and redistribution within the family and society at large. How do expatriate wives navigate market-based solutions abroad – without access to, for example, childcare – and what are the implications for their migration, work and gender equality when they return to Sweden? How do they reflect upon gender, national identity and heterosexual family ideals in this situation?

9.2 From Gender Equality to Homemaker and Back Again

The transition from a system built on 'stay-at-home-mums' to the dual-earner household has been crucial for the Swedish model from the 1960s and onwards, at a time when traditional values and ideas about the nuclear family were questioned (Lundqvist 2015). Economic and social independence guided governmental committees at the time, with the goal that women should no longer have to choose between having a job and having children (SOU 1964, 36). In conjunction with this vision, the Swedish state initiated an activation programme to bring women out into the labour force which, in the coming decades, would introduce one million women to salaried labour; women in Sweden would thus proceed from a 'housewife contract' to a 'gender equality contract', in which (primarily) childcare was taken over by state institutions (Hirdman 2002). Carbin et al. (2017, 106) argue that homemakers can be defined 'by their absence from the labour market and their presence in a heterosexual marriage'. This is also a dynamic that is centred in the women's narratives, their situation of being an expatriate wife and – at least during this

period – being located outside the labour force and the relation to issues of work, pensionable income and financial dependence on their husbands.

In contemporary Swedish society, with the dual-earner household and the primacy of salaried work as the core of the welfare state, criticism has drawn attention to how 'employment' is prioritised over the question of how much we actually need to work in a society where productivity is constantly increasing (Paulsen 2010). The feminist critique of the primacy of salaried work points out that women's historical entry to – and 'liberation' through – the labour force during the 1960s and 1970s also meant that the 'housewife norm' was replaced by a 'salaried work standard', where state-run childcare and domestic work would be performed outside, or alongside, salaried labour – a task referred to as 'the second shift' (Carbin et al. 2017, 36; Hochschild 2003). Women still devote a larger amount of time to household work compared to men (Statistics Sweden 2018).

9.3 Gender and Migration in the Swedish Pension System

Since two-thirds of my informants were 60 years or older, the pension system is of particular interest for this chapter. The income-related pension system in Sweden is based on three parts: *general pension* (*allmän pension*, which includes all kinds of state-financed subsidies through social taxes), *occupational pension* (*tjänstepension*, which is income related and paid by the employer) and *private savings*. Of pivotal importance in relation to gender and migration is the change in the income-related pension which, after the 1994 Swedish pension reform, was guided by the 'lifetime-income principle' (Government Bill 1993/94:250). The lifetime-income principle replaced the earlier rules that were based on the best 15 income years of a person's life, which was considered too expensive. This change would disadvantage both those working part-time and those who were periodically located outside the labour force as a result of unpaid (care) work or for other reasons – in other words, primarily women and immigrants (Ekberg and Lindh 2011).[1] Expatriates are, in general, dependent on their contracts with private companies.

Other parts, such as social assistance or the state-financed *guaranteed pension* (*garantipension*) exist to protect those who have earned little or no income during their lives. A state-financed guaranteed pension is based upon income, civil status and the length of residency in Sweden. In order to receive the maximum guaranteed pension (8254 Swedish *kronor* a month) a person must have resided in Sweden for 40 years, between 16 and 64 years of age. In 2019, every third pensioner – 656,700 people – received a guaranteed pension (Pensionsmyndigheten 2019), four out of

[1] Rules and regulations vary due to where the person comes from, in which country s/he has resided as an expatriate, etc. Since women in this study comprise such a heterogeneous group relative to their time abroad and their countries of residence, I cannot account for all possible scenarios in this chapter.

five of whom were women. As we shall see, the guaranteed pension did not, in most cases, cover the situation for the expatriate wives interviewed.

It is, for 'natural' reasons, more difficult for those who immigrated later in life, to earn a pension equivalent to native Swedes within the system of the lifetime-income principle. Furthermore, immigrants do not have the right to a full guaranteed pension if they have resided in the country for less than 40 years. As Ekberg and Lindh (2011, 38) state, there are no simple conclusions to draw in studies between foreign and native-born pensioners but they point out that 'the previous rules for calculating public pension [based on income from work over a 15-year period of time] were more favourable to immigrants than the recent rules [based on the sum of salaried work throughout a person's entire life]'.[2]

Despite the strong focus on gender equality in working life, women continue to dominate the group of poor pensioners in Sweden as they only have 68% of men's pensions on average (Statistics Sweden 2018, 86). In a pension system mainly based upon salaried work, the well-paid (often men) working full-time for their entire lives are rewarded, whereas those (mostly women) who work part-time or for portions of their lives in poorly paid professions are disadvantaged. This arrangement has a significant meaning for women in general, who spend more time than men doing household work, are more likely to have part-time jobs within the public sector and have structurally lower wages, earning an average of just 76% of men's wages on a yearly basis (Statistics Sweden 2018); it is of particular importance for the expatriate wives interviewed here.

9.4 Fieldwork in an All-Women's Network

The study is based on qualitative interviews, participatory observation and visual methods with women who returned to Sweden after living a shorter or longer period of time abroad. The data are drawn from 46 semi-structured and in-depth interviews with returning Swedish migrant women and participatory observation on 25 occasions over a period of 8 months of fieldwork in four different cities in Sweden during 2014 and 2015.[3] The women were also asked to draw a map of their social networks, which served both as a basis for discussion and to give an overview of their (perceived) social locations.[4] Most of them had joined various networks for

[2] Author's translation.

[3] The interviews were carried out by post-doc Lena Sohl, hired on the project 'To reintegrate Swedishness: The policy of belonging among repatriating Swedish migrant women'.

[4] All material has been rendered anonymous, includes both names of the informants, local chapters, as well as businesses and other information that could be used to identify the informants. The project was approved by the Central Ethical Review Board in Linköping. It follows ethical guidelines and principles for societal research through informed consent, anonymisation and confidentiality within research. Contact information has not been stored together with the transcripts. The women have consented to audio recordings and publication of their transcribed interviews. They

Swedes returning 'home' but they were mainly recruited through the Swedish Women's Educational Association (SWEA) in Sweden, via participation in SWEA's activities and via a snowball method, whereby one informant suggests others. SWEA is a broad international network with around 7000 members worldwide. Although it started as a network for accompanying spouses abroad, some of the largest local branches today are found in Sweden. This is not surprising, since returning Swedes have been one of the single largest immigrant groups in the country for many years.[5] Originating from the SWEA network resulted in a group dominated by expatriate wives.[6] The informants were between 33 and 80 years old and had been living in around 30 different countries, in some cases for as long as 45 years.

Participant observation was carried out in SWEA's local chapters and networks in Sweden at lunches, after-work meetings (despite the fact that most of them were not working) and during cultural activities such as theatre visits. Although the transcribed interviews constitute the primary source of analysis, participant observation has offered contextualisation of the interview material and a way to create contacts and trust in the interview situations. This type of 'crystallisation' facilitates the perspective of a research question from different angles in order to reach a more coherent picture of a phenomenon or to discover contradictions within the material (Barbour 1998; Richardson 2000). Potential informants were encouraged to contact researchers voluntarily without being selected by the chairman or other gatekeeper, although this procedure also raises questions about what characterises those who voluntarily choose to participate (Morgan 1998). Certainly, the interviews revealed a general willingness (and, perhaps, need) to speak about issues related to (salaried and non-salaried) work, gender equality and Swedishness.

The fact that the majority of the women had been expatriate wives rather than women with their own careers, coincides with previous studies of Swedes abroad which show that significantly more men have moved abroad due to (their own) employment than have women (Solevid 2016). During the interviews, questions were asked about migration histories, the reasons behind moving home again, relationships (to their spouses), employment, housing, finances, feelings of 'belonging' – both abroad and in Sweden – and about their life situations having returned to Sweden. Through close reading of the transcriptions, some common themes and variations of them within and between the interviews have been identified (Mason 2002).

The majority of women were in their 60s and 70s at the time of the interviews and maintained a relatively privileged lifestyle following their position abroad as an

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have been able to choose, throughout the process, whether or not they wanted to answer the questions or discontinue the interview.

[5] This has recently changed after the large wave of immigration due to the war in Syria. In 2018, the largest groups of immigrants were those born in Syria (14,387), Sweden (12,805) and Afghanistan (8093) – see www.scb.se

[6] A few did have a career of their own; however, they are not the focus of this chapter. See Lundström (2018) for a more detailed comparison between these groups.

'international' upper-middle or upper-class female. Their lives abroad had been dominated by taking care of the children, domestic work, representation and hospitality in the form of social events and dinners, acting as employers for their domestic workers, volunteering (often in connection with children's activities or school) and participation in the various social activities arranged by SWEA or other social clubs. A small group of women had their own international careers, working mainly for Swedish or international companies or organisations. The age of the women and the fact that they were interviewed after their return to Sweden means that the perspectives in their stories shift – while they look *back* at their time abroad, they describe their lived *present* in Sweden. The analysis is thus based on the statements being shaped by the interview situation as such, as a form of situational knowledge in relation to time and space (Haraway 1988).

In many ways, migration did not interrupt the women's structural privileges linked to race or class. However, as the interviews show, this group of white Swedish women holds a central position in maintaining (white) male transnational privilege within the family structure and men's social positions in the new society. At the same time, these family-related privileges also maintained the women's gendered dependence on their husbands, abroad as well as back in Sweden on return.

9.5 The Transnationalisation of Social Inequality

The majority of women in this study have – like many other immigrants – been located outside of the Swedish labour force for large periods of their working life, due to the lack of childcare, work permits and other circumstances during the time abroad. These conditions significantly affected their (right to a) pension upon return. As stated, this group of (returning) expatriate wives are not representative of poor pensioners but they equally diverge from the Swedish self-image of a gender-equal society in which women participate in the labour force on equal terms with men (Suter 2019).

One way to situate the women in this study is to proceed from Weiss' (2005) discussion on the *transnationalisation of social inequality*, in which migrants are positioned in varying ways depending upon their ties and access to 'weak' or 'strong' welfare states. Since migrant populations are located in more than one nation state, Weiss highlights how labour markets, cultural capital and reciprocal relations are increasingly transnational. One aspect of this transnational relationship is that 'people often remain socially or symbolically attached to places after they have physically left them' (Weiss 2005, 713) – in this case to the Swedish welfare state.

Weiss (2005) distinguishes the following three social positions in a transnational world society; the transnational upper classes, the middle layers and the lower positions. These actors have significantly different positions within transnational migration, defined by their dependencies and affiliation to different nation states and welfare systems. The women interviewed, who belonged to what Weiss calls the

transnational upper classes, described themselves as more or less financially independent and, thereby, to a greater extent, independent of the strong Swedish welfare state, as they were not dependent on the guaranteed pension, unemployment benefits or other economic support, yet had access to basic services such as health care as Swedish citizens.

For *the middle layers* – who are more 'dependent on the national welfare state they are affiliated with' – gaps in the strong Swedish welfare infrastructure were more worrisome (Weiss 2005, 714). They underscored (and at times rediscovered) their dependency on and their trust in the Swedish welfare state, as they often kept their Swedish citizenship while abroad as a guarantee for the future. Many of them believed that they, as Swedish citizens, had rights to a guaranteed pension in Sweden and were often unaware of the requirement of residency in the country. Both cases, however, tend to include a great measure of dependency relative to their husbands. While the women themselves often requested family-oriented political solutions to issues of income redistribution and pension, the chapter raises the connections between the women's condition and broader political issues within the framework of welfare policies and redistribution.

9.6 Leaving Working Life – And Losing Swedish National Identity?

Expatriate life involved a different turn compared to those remaining in Sweden. In the absence of work, life seemed passive and 'dull' for many of the informants. This reflects the fact that the choice to work or not rarely seemed to be an entirely individual choice. Rather, it was a question of work permit, childcare and practical circumstances, as 38-year-old Ulrica explained:

> Everyone wanted to work but nobody did because you are expected to be at home and take care of the children and that is a full-time job in itself. […] You were expected to be a housewife. […] As a woman, I was not accustomed to standing behind my husband. I had a hard time with that and I was annoyed by it too. […] The woman should be there and take care of the children and that is absolutely fantastic in many ways; without the women, the men could not have done their things. […] Which is good but, well, I had a hard time with it and I actually had a hard time with it the whole time.

Leaving professional life is an issue that traverses gender, national identity, the division of labour and heterosexuality. Expressions such as 'You are expected to be at home and take care of the children' reflect Ulrica's view of what a woman is required to do or be – unclear by whom – even if it is contrary to Swedish perceptions of gender equality. In other words, as the family moved out of Sweden, Ulrica saw herself being 'expected' to give up her job and become 'a housewife', thus filling the void of national childcare. While the welfare-state infrastructure was a foundational pillar for women's participation in the labour force, the women in this study

have been those retreating to the home when these services are no longer available. Despite their age differences, the women had an overwhelmingly consistent picture of their expected duties in the expatriate family.

The women's new roles abroad were described as a prerequisite for the men's lives and careers but, at the same time, they carried a feeling of subordination. On the question of whether the women felt that they had sacrificed something during their stay abroad, they often mentioned the lack of a professional life.

The idea of gender equality in Sweden – in terms of work and dual-earner households – has been intimately associated with a form of national identity or belonging, in addition to a political system (Keskinen et al. 2009); the relationship between gender equality and Swedishness proved to be central to the women's reasoning about work and expatriate life. Having a job and a professional identity was indeed described as a crucial part of the Swedish national identity itself. Since migration is not a clear before-and-after experience but reflects on-going emotional journeys, national ideologies are not something so easily left behind (Ryan 2008). As first-generation migrants, they carried with them specific national discourses of gender equality. The interviewed women both identified with and contested the Swedish gender-equality ideology. It was clear that they – as expatriate wives – did not live up to a gender-equal Swedish lifestyle.

When the women visited Sweden during the summer, many of them became aware of the fact that they were not able to transfer the role of an expatriate wife – and someone globally privileged – to a Swedish norm of salaried labour, as experienced by Edith (67):

> When you were home during the summer, you felt a little bit like an alien […] Everyone talked about their job and job-related things and so on and you… Well, of course you could talk about ... But it felt so silly to talk about… No one was interested in hearing that, because you were expected to talk about job and day-care and all that […] So this sense of a professional identity disappeared.

Being stuck between your 'job and day-care' seems to be the obvious and 'normal' life puzzle for women with young children in the Swedish dual-earner household. For Edith, living a life outside of salaried work appeared to be just 'silly'. Elsa, 70 years old, on the other hand, explains that she has never 'been up for a career' and that she 'liked to be home and putter' – 'I don't like to be stressed and I like to do what I want'. The tendency to reduce care work to "puttering" was also central to the rhetoric of liberating the homemaker during the 1960s (Carbin et al. 2017). Other women argued that, for the first time in their life, they were allowed to see what life could be like outside the realm of salaried employment. For 70-year-old Elise the adjustment to becoming an expatriate wife was dramatic in a positive way:

> When we moved to Luxembourg, I was actually at home first, which was just incredible, when suddenly one could choose, when one was not forced to do something. […] I thought it was nice, if I may be completely honest.

For Elise, the feeling that it was 'nice' not being '*forced* to do something' was associated with the sting of a guilty conscience, a feeling of traversing Swedish norms that were taken for granted. Nevertheless, although expatriate wives

sometimes appreciated life outside salaried work, this economic dependency would follow them through life.

9.7 To Be a Homemaker: On Subordination and Dependency

Becoming a 'homemaker' as part of the role of an expatriate wife was often the result of circumstances surrounding residency abroad. Without state-subsidised childcare or a working visa, in a heterosexual marriage that provided the husband with a salary as the breadwinner of the family, in combination with wife-related duties and mothering, the 'stay-at-home mum' became the solution and the prerequisite for the stay abroad as well as for the husband's career, as 75-year-old Maj explains:

> I mean, I've been an accompanying spouse to my husband and that involves a lot of work. There was a lot of representation, both at official occasions and at home and there were cocktail parties and dinners and… […] You have to go through with it. […] It might sound glamorous to say we had cocktail parties and dinners. […] But there is a lot required to pull that off.

In addition to representation, Maj describes life as an accompanying spouse as a time-consuming duty: 'You have to go through with it … There is a lot required' (cf. Arieli 2007; Fechter 2010; Hochschild 1969). Family life in the Swedish gender-equality system – based on salaried work – and the conditions for life in an expatriate family thus look fundamentally different. As Fanny, 69 years old, puts it: 'In Sweden you are expected to work, in Brazil you are expected to be at home'. Some women perceived it to be a 'luxury' to be able to live on one salary. While the expatriate wife was in a privileged position abroad, in a community mainly populated by white women dedicated to various gendered duties, it was at the same time associated with dependence and subordination, as Fanny continues:

> I had a red line over my name [in the visa], with the word *dependencia* [dependent] written across it, which means I was financially dependent. So when Amanda [her daughter] would turn 12, she would get such a dash too. And then I said, 'She shall never experience having a red line over her name', so that was one of the reasons why I was pushing for us to go home.

For Fanny, the position as 'dependent' became painfully tangible and impossible to live with when her daughter was given the same status of *dependencia* as she had herself. In connection to this, her own situation became unbearable and she was now 'pushing' for a move back home again. For others, financial dependence led to a feeling of inequality that was incompatible with a Swedish identity. Tora, 64 years old, says that:

> [When I] came to Germany and wanted to start a contract for a cell phone, I couldn't do it, because I was an accompanying spouse [without an income of her own]. It was very hard for me. It was incredibly hard. […] I did not think about it until I realized that 'Oh dear, here you are like a ...' One belongs to the husband in a completely different way, which I do not like of course. […] In that sense, I am very Swedish and I want to deal with things myself and be free and I do think, in a way, that people should work.

Abroad, the women felt limited and curbed in their new position. Tora discovered that she was unable to take on a cell phone contract for herself, which became 'evidence' of her subordinate position. The women's new lives as caregivers in the expatriate heterosexual family also highlight the interrelations between gender, power and globalisation, in which 'the success of global capitalism [is] fundamentally based on sexism' (Fechter 2010, 1281). Structurally, while men have prominent roles in (masculinised) transnational companies, women manage the 'household service' in the (feminised) home (cf. Hearn 2015).

Virtually all the female interviewees described the role of the expatriate wife as associated with a sense of subordination in some way. There was a tension between the fact that they carried with them national ideals of a dual-earner household model based upon gender equality and salaried labour while, at the same time, practically dedicated themselves to unpaid (and perceived as) 'insignificant' care work. The feeling of inequality, subordination and incompleteness was something that the women handled in different ways. Hilda, 67, explains that 'Thankfully I like cooking, and that was the only way I could show that I was good for something […] but I would rather have had a job that provided a pension'. Others pointed out that gender equality could be upheld by equating different gendered tasks (as an alternative dual-earner model). Still others did various types of non-profit work in order to not appear as dependent wives, especially before they had children. Their strategies show how women in different ways managed the inequality that framed their lives. It was also common to hire an external person, often a migrant woman, to take care of the domestic work, in order to feel less dependent on one's husband and appear less 'un-Swedish' (e.g. Lundström 2012, 2013, 2014).[7]

9.8 'What Do you Do all Day Long?'

The women strongly identified with Swedish gender-equality ideals and the feeling of gender inequality was therefore posed in contrast to Swedish norms and values. As Alva, 80 years old, points out, 'all' women work now, 'there are no housewives anymore'. It was also difficult to explain to other Swedes what they occupied themselves with during the day, as Ellen, 59, shows:

> People say, like, 'You mean you're not working [gasping] … but what do you do all the time?' […] It's pretty strenuous for two people working full-time and having young children and manage everything […] I don't think I would have had four children if I had lived in Sweden, I do not think so, it would probably have been enough with two, I think.

Basically, Ellen describes care work as something occupying all her time. This raises the issue of both working women's 'second shift' and the work carried out by

[7] The international division of labour has been analysed by a number of researchers (Ehrenreich and Hochschild 2003; Gavanas and Calleman 2013; Lundström 2012, 2013; Lutz 2011; Parreñas 2001).

women in public childcare. Had she needed to have a salaried job in Sweden, she would probably have chosen to have fewer children. However, care work, as such, was not seen as credible work by 'Swedes', according to the women. Nathalie, 53 years old, recalls an occasion in Sweden when the question of her professional life came up:

> I thought I was someone; but apparently, I am not any longer since everyone else is trying to make me to understand that I am not. […] Identity issues mean much more than you imagine, because there are so many who comment on my life, in one way or another, when you come home [to Sweden] […] I don't think that anyone asked me what I did for a living during those two years [abroad]. Here we are so damn quick to ask 'So what do you work with then?' and that is not a positive question – in fact, [what job one has] it is not interesting at all.

Not being able to account for a (professional) life when meeting Swedes was a new experience for Nathalie, who did not come across such questions during her life as an expatriate wife. In her account, Sweden appears to be a country where one is required to have a job and a professional identity in order to 'be someone', in contrast to her life as an expatriate wife in Malaysia. For Nathalie, the lack of a professional identity was a matter of existence. She felt that she 'shrunk' without a job in Sweden. 'I wonder, who am I now?' she says. In this way, the norm of salaried work is a forming system that both augments and shrinks people depending on their location in it. Clara, 43, also describes the summers in Sweden as occasions when she experienced an 'inferiority complex':

> It came every summer, every time you went back to Sweden, it came… this inferiority complex [...] which I know many others identify with too. During the summer when you… come home to Sweden on holidays, for example, people ask 'What do you do all day long?' because what I did all day, there is no one in Sweden who can come to terms with that, because it is just luxury, so they say, 'You have no job, you are just floating around'.

It is clear from the quotes that care work itself was not itself considered a job by people in Sweden. It is something that is done without being done. What does Clara actually do 'all day long' without salaried work? The women thus find themselves with the feeling of actually performing a job but without a professional identity. At the same time, it is a fact that women are the ones who perform 'the second shift' in addition to their salaried employment (Hochschild 2003). In this way, expatriate life seemingly presupposes that there are one (or more) women who conduct household work, childcare and representation as their (unpaid) work.

However, the women's stories show that Swedish norms of gender equality tend to become subordinated to gender norms within the framework of the heterosexual family in expatriate contexts.[8] Although the women feel subordinated and less valuable in their roles as expatriate wives, ideas about Swedishness and gender equality become secondary in relation to the expected ideals of gender and heterosexuality in practice, in the sense that the dual-earner household model no longer functions as

[8] The women interviewed who had a career of their own often tuned down the importance of their work in relation to their husbands' (Lundström 2018). They also hired services carried out by a third party, like many expatriate families do when the women do not work (Lundström 2014).

the dominant ideal. Only gender appears to prevail from the gender-equality contract. Indeed, there seems to be a conflict between the absence of a professional identity and explicit ideals of gender equality and Swedishness, although not between mothering and implicit norms of heterosexuality and gender. Apparently, the expatriate wives found themselves snapped back in time between the choice of being a Swedish gender-equal woman or a mother in line with heterosexual gendered norms.

The reasons for returning to salaried work in Sweden were not only economic in nature but a matter of identity and a sense of independence for this group of women. Solveig, 69 years old, explains that 'Many people asked me when I started: "Why are you here ... you do not have to work?" It doesn't have to do with that. […] You have to feel good about yourself'. Sabine, 68, did not want to accompany her husband without being sure of her work still being there for her when she came back:

> Yes, it was very important, because I have never been unemployed, so I absolutely wanted my job. […] I wanted to be independent as well. […] I mean, that you are a person of your own, with one's own profession. And not just a housewife. But having your own job, your own thoughts, and your own colleagues and not in need to… It was something that my mother inculcated in me: 'Make sure you have your own profession so that you won't become dependent on your husband'.

Having a job is here linked to a sense of independence and having 'your own thoughts' and 'your own colleagues'. A professional identity is still associated with being a worthy human being in a broad sense and, even further, with a Swedish national identity. This logic reflects both the dual-earner household model and the primacy of the work ideal. In order to be 'someone' and mean 'something', one must have a salaried job. This reasoning became painfully clear upon returning to Sweden.

9.9 Back to the Future in the Swedish Welfare State

Although most women saw the opportunity to move abroad as a positive experience that would enrich their lives in many ways, they later realised that they would encounter new situations – in the present as well as in the future. At first, the question of profession and salaried work appeared to be a matter of identity but, arriving back in Sweden, the issue of provision in the Swedish welfare state became an economic issue. The Swedish welfare system did not function in the way they had imagined it would. However, the choice to return did entail an existential dimension in relation to both gender equality and national identity, as Clara, 43, found:

> Subconsciously, it was important to move back to Sweden. I felt like I slowly disappeared, it sounds like a big word, but your identity as Swedish ... Women are expected to work ... We are expected to be equal, and to work…

Clara's choice to return to Sweden was rooted in a sense of disappearing as a person abroad. When her professional identity – and thus her identity as

'Swedish' – was lost, she felt that she 'slowly disappeared'. Returning to Sweden further exposed the women to the practical questions of income, pension and basic security that they had been able to take a break from during their stay abroad. They were now confronted with the Swedish welfare system that did not account for their position as expatriate wives in between different national systems, most overtly with regard to the pension system – which is based on having lived and worked in Sweden (or elsewhere).[9] They were confronted anew with their positions as heterosexual subjects in a position of dependence. If they had previously perceived their time abroad as expatriate wives as a parenthesis in their lives, they now learned that their migrant history would also define their future. As Laila, 55, puts it: 'I had imagined that there was some sort of basic sum of 7,000 [guaranteed pension] something, for everyone, but that was not the case. If you haven't worked in Sweden, you won't get a [guaranteed] pension, and after all, I hadn't'.

Back in Sweden, it was difficult to re-integrate into society. Nathalie, 53, describes how she had to re-evaluate the meaning of her citizenship:

> You had to start thinking about things that I had never thought of before. In the past, I had really felt safe, everything had been arranged, and all of a sudden, it was like… I almost panicked when I realized that I have... I have nothing. If something were to happen, then I would be completely alone, without help from anyone. So you feel a little... Not being welcome home, but a sense of... 'Well, if you are so stupid as to go abroad, then you can have this too', a little bit like that… Pretty much so in relation to both authorities and systems and people and…

If Swedish citizenship constituted a kind of assurance abroad, with the feeling that someone would take care of you when you return home, coming back and realising that no one had prepared a place for you was therefore a shocking insight. In her encounter with the national welfare state, based on salaried labour in the dual-earner model, Nathalie found that she was left 'completely alone' with a sense of panic. Fanny, too, explains that it was 'quite difficult' to come back, encountering a welfare system not merely based on Swedish citizenship. As Solveig explains, those who 'lived for many years abroad do not have a good pension when they come home … and one's self-confidence is not exactly at its height. […] So, when you are faced with the shock of maybe not getting a job […] then we sacrifice our experience'.

9.10 Family-Oriented Privileges and Gendered Dependency

It is important to point out that the women were located in privileged positions relative to many other migrants, since their husbands in many cases actually *could* support them. Yvonne, 62 years old, explains that:

[9] Pension rules depends upon which country a person has resided and worked in, as well as whether or not s/he has refugee status.

> I never worried about that, but I do know that I don't have any pension to talk about, basically nothing but we have thought about that in the family, so I will probably manage anyway...

Not having a pension 'to talk about' does not seem to worry Yvonne. Without a pension of one's own, the women remained dependent on their husband's pensions (or allowances) and their good will. Birgit, 77 years old, explains that she does not worry too much about it either:

> My husband has a good pension, he has a great pension, but if he should pass away or pass on as you say, then I must ... I won't be able to live in this house, for example [...] No, it won't work, so in that case I have to sell everything. But that's the way it is for most people.

Without her husband's support, Birgit no longer sees herself being able to afford the house she lives in. As for 75-year-old Maj, safety is conditional on her marriage and the fact that her husband was alive:

> I do feel safe because of our private savings, quite frankly. But if I were alone ... then I'd need to have some saved capital to live on, because I can't live on this pension.

Maj and Yvonne present themselves as independent subjects, relative the nation state, due to their private assets and savings. Like the transnational upper classes in Weiss' (2005) analysis, they perceive themselves as relatively independent with regard to the welfare state. However, regardless of their (perceived) independence from the state, their provision was in most cases dependent on their continued marriage. Hence, such safety was often conditioned by their husbands and/or their possible generosity.

Through their husbands, Yvonne, Birgit and Maj, like other women, had access to significant economic and social privileges. Their white upper-middle-class privileges were, however, as Phyllis Palmer (1989, 16) formulates it, 'integrally linked to their subordinate relations with white men'. Family-related privileges thus maintain their class and racially structured positions, yet through a gendered dependency, in the present, as well as in the future. Nadja, 46, explains this:

> I have had no private pension savings in Sweden over these 11 years, so it is like a hole that is very noticeable, really […] as an effect of our mobility.

In addition to the feeling of insufficiency, there was an underlying concern for a possible divorce. Ellinor, at 61, realised that she could not afford a divorce: 'I don't have the resources'. The women who had divorced were obliged to ask other family members for financial help. Forty-year-old Stella's dependency on her husband only became apparent after their divorce:

> We had a joint pension fund so that half of the money ... but when we divorced, my part was frozen [until retirement age], so I have it, but I can't draw on it – the money is still there.

Sigrid, 54, says that when she looks back on her stay abroad:

> I regret it, because it is more fun to work as a civil engineer, you make money and have a fun job but, at the same time, I have had a very good life with our children and we always had a stable financial situation since he had a good international position and earned very well.

Sigrid reflects on what she sacrificed while being at home with 'our children' and concludes that she gave up 'money' and 'a fun job'. Today, Sigrid is divorced and has moved away from her husband; she explains that 'I have no right to the salary, but I still get [an allowance] thanks to his good will' – precisely, the kind of dependency that the Swedish welfare state is structured to avoid.

Their location between heterosexual family norms and working ideals affected the women's political views. The issue of individual taxation, which has been a matter of course for Swedish policies of gender equality, was perceived as a hindrance for them. Elisabeth, 45 years old, now argues that 'it might not be so bad with joint taxation, [it is] actually a kind of work to take care of a family and children'. Signe, 70 years old, on the other hand, thought that 'perhaps it should be more natural to be at home and take care of young children for a longer period of time'. Suddenly, the Swedish gender-equality policy and dual-earner model appeared as an individual loss for them, as Elise, 70, says:

> We did not get any pension credits when we moved […] but if you live in a country where you get at least part of your husband's pension… That is impossible to say in Sweden. Then people go mad […] 'But what if you have lived your whole life together, shouldn't you share your pension?'

From their perspective, men should not be able to choose whether or not they share their income and pension with their spouse. Without the right to a guaranteed pension then a generous spouse, a family fortune, an inheritance or a loan became the salvation for women. In the light of these circumstances, these women perceived a joint (family and marriage-based) taxation system to be more advantageous. When looking at the family as a unit, 'the income pooling […] enables the household to be perceived as a unit with unitary interests, despite the very different relationships to production of its separate members' (Hartmann 1981, 374). However, are pension issues and income distribution in relation to gender and migration merely a family issue?

9.11 Conclusions

This chapter has examined the experiences of returning migrant women and their negotiations of gender (in)equality, work and national identity in expatriate families caught between different market-based systems abroad and the national welfare system in Sweden. In many ways, the women's work enabled their husbands' careers and expatriate life and family. The women were thus located between a heterosexual family norm (in which women continue to take the primary responsibility for children) and the Swedish model of gender equality (in which women and men are co-equal individuals in a dual-earner household relative to the services that the welfare state provides). Upon migration, the ideals of the dual-earner household model were not transferred into new contexts and situations. When the welfare state withdrew, the women in this study had to fill the void.

On the one hand, the women said that they were 'expected' to be flexible actors in a global market and, at least indirectly, willing to give up a career for their husband's jobs in Swedish (or transnational) companies abroad. On the other hand, redistribution in the national welfare state is organised on the principle of residency and labour conducted within the country. As a solution to this situation, the women requested a policy of joint taxation, organised to fit their roles as global actors in a heterosexual family norm.

Could their situations be perceived differently? The outcomes of Swedish gender-equality policy continue to disadvantage female pensioners, who work part-time to a greater extent than do men. At the same time, immigrants have difficulty in receiving an acceptable pension – and living standard – during their time in Sweden (Ekberg and Lindh 2011). These women's stories reveal the shared vulnerability of both these groups and problematises 'taken-for-granted' conflict lines between Swedish citizens and migrants.

If the guaranteed pension is a basic protection, questions raised are perhaps why residency should matter for the care work (in this case) that is carried out. If the opportunity (for Swedish men) to move and work abroad (for Swedish or international companies) is dependent on unpaid care work (conducted by women as 'trailing spouses'), it may be reasonable to ask what the principles of redistribution should look like. In this case, there are both similarities and differences between the various immigrant groups. While Swedish citizens (foreign- or native-born) residing in Sweden are entitled to a guaranteed pension, regardless of whether they have worked or not, Swedish citizens living and working abroad are generally left to agreements with a private employer. Which parts of the welfare system should (foreign- or native-born) Swedish citizens then be entitled to and on what principles should these rights and distribution be based? For Swedish citizens with an immigrant background, the question arises as to how to adjust their lives retroactively. How can those who migrated to Sweden later in life have the opportunity to have a full working life in accordance with the principle of a lifetime income?

Expatriate wives certainly make a choice when they move abroad with their husbands. Yet their experiences clearly challenge Sweden's ideal of gender equality, where men and women share salaried work. This raises a number of questions for further research: Why do women continue to sacrifice their careers for their husbands' careers and what does this reveal about gender norms in Sweden in relation to political ideals of equality? What is expected from citizens and actors in a globalised labour market and economy and how should a national welfare system adjust to these requirements? Who benefits and who is disadvantaged in the current globalised labour market?

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Chapter 10
(Im)mobility Patterns among Polish Unemployed Migrants in Iceland Navigating Different Welfare Regimes

Anna Wojtyńska and Unnur Dís Skaptadóttir

10.1 Introduction

In the autumn of 2008, Iceland was hit by a severe financial crisis that lead to a period of economic recession. The construction industry was one of the first sectors to be seriously affected, with many bankrupt companies and extensive layoffs. At the time, foreign citizens constituted 37% of the total number of workers in this sector, the majority coming from Poland (Statistics Iceland n.d.-a). The contraction of the economy resulted in an outflow of foreign workers from the country; however, it was not as extensive as commonly anticipated at the time (Eydal and Ottósdóttir 2009; Garðarsdóttir 2012). Firstly, the demand for foreign workers did not disappear with the financial crisis, because some sectors had become dependent on employees from abroad. Secondly, some migrants, despite losing their jobs, decided to continue living in Iceland. The unemployment rates among foreign citizens jumped from 1.3% at the end of July 2008 to 12.4% at the beginning of 2009. At this time, the unemployment rate among Polish citizens was as high as 18%, peaking in March 2011, when it reached 23.6% (Directorate of Labour n.d.).

In this chapter, we seek to answer the question of why so many unemployed Poles decided to stay and even bring their families to join them in Iceland, despite stagnation in the economy and the scarcity of available jobs. Based on interviews with unemployed Polish migrants, we examine how they negotiated and adapted to the social risks and changing circumstances encountered in the countries of emigration and immigration, as well as the way they navigated the available 'resource environments' (Levitt et al. 2017) emerging in conjunction with the different welfare regimes. We particularly examine the European Union (EU) regulations for social-security protection *vis-à-vis* national welfare-protection policies regarding

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unemployment in Iceland and Poland and their possible ramifications for the mobility and (im)mobility of foreign workers in Iceland. Furthermore, we highlight some problematic interactions between the internationalisation of the labour market and concomitant transnational livelihoods, EU social policy and the welfare-assistance environment of member states. In so doing, we apply a critical approach to the commonly assumed high flexibility and geographical mobility of migrant workers, which tends to overlook counterfactors that influence different forms of staying put.

10.2 Intra-European Labour Mobility

The mobility of people, including the free movement of labour, constitutes one of the fundamental rights of EU (and EEA) citizens. It comprises one of the four pillars of the EU internal market, along with the free movement of goods, services and capital. The strong emphasis on unrestricted geographical mobility present in current EU policy reflects dominant (neo)liberal ideologies which typically equated mobility with the values of freedom and universalism (Adey 2017). The unrestricted cross-border movement of labour has been portrayed as one of the central mechanisms promoting intra-EU economic and social integration. The formation of the EU's common labour market was seen as a means to increase productivity, which would subsequently lead to an improvement in living conditions and working standards in the whole region (Verschueren 2015) and, in this, way enhance social cohesion across the member states (Engbersen et al. 2017). Therefore, the mobility of workers has been actively promoted, encouraged and enabled on many levels of EU policy. The European Job Mobility Portal (EURES) was launched to help to disseminate information about job vacancies and connect job-seekers with employers in different EU states, as well as to assist with work placements. In a way, cross-border work-related mobility became part of job activation measures, because unemployed individuals are often advised to move abroad and follow employment opportunities in other member states. Moreover, the EU operates various programmes to stimulate people's mobility, such as the exchange of students, academic staff, artists and specialists.

Simultaneously, one important objective of the EU policy has been to diminish possible impediments to the free cross-border mobility of EU citizens. Since an inability to move acquired social entitlements earned in one EU member state to another could prevent individuals from undertaking work in another EU/EEA country, the European Union Benefits Scheme was implemented to guarantee the transfer of social-security rights between member states (d'Addio and Cavalleri 2015). This portability of social-security rights – albeit to different degrees – applies, for example, to health-care services, old-age and disability pensions, parental leave payments as well as unemployment benefits. In the case of unemployment benefits, the scheme is based on two key principles: the aggregation principle and the exportability principle (Alcidi et al. 2017). The aggregation principle ensures that time worked in any of the member states will be counted when granting access to

social-security entitlements. The exportability principle allows for acquired rights to social security to be moved from one nation state to another within the EU. This is an important step towards improving social protection accessibility for EU (and EEA) citizens. However, the impact of the EU Benefits Scheme on mobility might be slightly different from that intended due to considerable discrepancies between member states in the scope and capacity of formal social protection. Firstly, as d'Addio and Cavalleri (2015) showed, the EU Benefits Scheme plays a minor role when people make decisions about searching for employment in another EU/EEA state. Secondly, as they further pointed out, it may even have a negative impact if it involves movement from a more-protective to a less-protective welfare environment. Additionally, it may discourage the return migration of unemployed migrants coming from countries with relatively weaker economies and insecure labour markets, as we discuss further in this chapter.

EU enlargement and the common labour market have undoubtedly contributed to the major growth in contemporary intra-EU mobility. According to the annual report of the European Commission, based on Eurostat population statistics, in 2017 there were 17 million EU-28 movers in the EU, of whom 12.4 million were in the working-age group of 20–64 years (Fries-Tersch et al. 2018). The report further indicates that the stocks of EU-28 movers are heavily concentrated in a handful of member states, with Germany, the United Kingdom, Italy, France and Spain hosting 74% of all movers. At the same time, Romanian, Polish, Portuguese, Italian and Bulgarian nationals made up to more than half of all EU-28 movers. Clearly, the labour demand in West European countries, combined with the continued wage and living condition disparities between Central, Eastern and parts of Southern Europe on the one hand and Western and Northern Europe on the other, drives a large part of intra-European migration. This further indicates that, for many Eastern European citizens, migration can be a strategy to cope with labour-market deficiencies in their home countries, rather than stemming from a desire to live abroad. In this sense, migration is a way to broaden migrants' resource environment beyond a single nation state. A transnational way of living helps individuals to deal with social risks in the home country and secure socio-economic welfare needs for themselves and their families, now and in the future (Levitt et al. 2017). Significantly, since many East European migrants are concentrated in the low-wage service sector of Western European markets, freedom of mobility, instead of reducing social inequalities, may instead reproduce them even further (Engbersen et al. 2017).

Classical economic theories commonly assume an adjustment capacity of migration flows based on the expectation that, in general, workers will follow available job opportunities (Kahanec et al. 2016). Accordingly, it is anticipated that migrants will respond to economic recession in the countries where they are working by moving either back to their countries of origin or onward to countries with better economic prospects. These expectations, however, have often proved misleading or have not been confirmed empirically. Building on examples from six European countries that were intensively recruiting workers in the post-war period to stimulate economic growth, Stephen Castles (1986) showed that what was originally intended as a temporary guest-worker system eventually led to family reunification

and permanent settlement. Similarly, the recent global recession did not result in mass return migration, partly due to the global character of the recession and the adverse economic and employment situation in the countries of origin (Awad 2009; Castles and Vezzoli 2009). Yet, staying in the host country might not always be possible, especially if migrants are deprived of social assistance or if their legal residence depends on their employment. If they are not ready to change to clandestine residence, they may be compelled to leave the country in the event of losing their jobs.

The current discourse of mobility as desirable and a privilege tends to overlook the fact that many people around the world might prefer to pursue more settled lives. The results of a large cross-country survey demonstrate that only 14% of the world's adult population wish to migrate to another country (Esipova et al. 2011). Additionally, as Diana Mata-Codesal (2015, 2275) argued 'staying put is not a passive-by-default situation' – on the contrary – it may be a valuable asset and a desirable choice for some households, depending on their access to socio-economic resources. However, with the grand narratives of modern times being characterised by fluidity and mobility, the social sciences have tended to normalise movement, simultaneously casting immobility as predominantly involuntary and enforced (Schewel 2019). Kerilyn Schewel (2019) argued instead for an aspiration/capability framework in migration studies, which allows a more comprehensive approach to (im)mobility. As there are many reasons why people move, there are also multiple reasons why people choose to be sedentary. Modifying Carling's (2002) aspiration/ability model by applying it to a concept of capability, Schewel (2019) suggests that we should look separately at individuals' aspirations and capabilities not only to explain mobility but also to highlight why people do not undertake internal or cross-border migration and also – as we do in this chapter – to explain why some migrants decide to stay or even settle in the destination countries.

Although perceived as voluntary, labour migration is often impelled by confined possibilities in the country of origin. At the same time, patterns of mobility, its length and character, typically depend on migration policies and formal impediments to movement or settlement. For instance, circular migration, the back-and-forth travelling that predominated among Polish migrants in the aftermath of the systemic change in Poland, were often conditioned by restricted access to labour markets in Western European countries and the limited possibilities of acquiring legal residency there (Okólski 2001). Therefore, EU enlargement and alleviated residential constraints for EU citizens moving within the EU (EAA) area opened up new prospects for Polish citizens, as they now had more freedom to leave, to stay and to return, depending on their aspirations and available options. Researchers studying post-accession migration from Poland have observed that, despite being intended as temporary, staying in another country often turns out to be prolonged or even permanent (Drinkwater and Garapich 2015). Likewise, the EU Benefit Scheme may encourage and/or facilitate migrants' settlement, as we show in the case of Polish migrants in Iceland.

Generally, EU policy seems to encourage more temporary forms of labour mobility, despite resulting in the growing vulnerability of migrant workers' rights.

Since employment protection remains, to a great extent, a matter for member states, it generates unfair competition between workers and leads to social dumping (Verschueren 2015). For example, the posting of workers, which falls under the mobility of services, undermines migrants' residential rights and access to welfare systems in the host countries. At the same time, as Verschueren (2015) has demonstrated by taking examples from recent cases brought to the EU Court of Justice, the current trend in EU practice is to favour freedom of commerce, even at the cost of workers' security. Therefore, migrants' mobility and flexibility may be largely framed by EU and member states' policies on the one hand and employers' recruitment practices on the other. It may be imagined, desired and imposed by neoliberal governance rather than being a desired condition by many foreign workers. Labour migration is predominantly driven by employers' need for cheap and supplementary labour in times of increased productivity – labour which can be easily disposed of during economic stagnation or downturn. Hence, migrants tend to be at greater risk of layoff and expulsion, which only perpetuates their temporary status.

This image of the flexible and temporary nature of migrants' work informs and further reinforces social boundaries that deem migrants as not belonging, thereby limiting their access to welfare services – which are traditionally distributed on the basis of national membership and fashioned to respond to the needs of sedentary populations (Anderson and Hughes 2015; Righard 2008). This assumed and implicit equation of migrants with temporary labour is also revealed in some academic discourse which regards migrants' attempts to exercise their rights to social security on levels equal to those of the local population as 'welfare shopping' or 'welfare tourism' (see the introduction to this volume).

10.3 Methods

The chapter draws on data from ethnographic research on the position of immigrants in Iceland, data which both authors have been collecting for over a decade and which have focused on employment-related migration to Iceland. However most of the data analysed in this article come from the project 'The participation of immigrants in civil society and labour market in the economic recession', carried out in 2011, about 3 years after the outbreak of the economic recession in Iceland in the autumn of 2008 (see Wojtyńska et al. 2011). The project applied both quantitative and qualitative methods, which included an internet survey among registered unemployed foreign citizens on the one hand and interviews with foreign citizens and representatives of various service-providers on the other. The survey, which was conducted online and sent to all registered unemployed migrants, rendered 516 responses, which was a sizable sample given that, at the time, there were about 1860 foreign citizens registered as unemployed in Iceland. More than half of the answers came from Polish citizens, followed by Lithuanians (12%) and Latvians (3%). The interviews were conducted both in two focus groups and individually. One focus group consisted of Polish migrants only and was conducted in the Polish language.

Another consisted of individuals of different nationalities of whom the majority came from Lithuania and the interviews were conducted in English. Altogether a group of 15 immigrants were interviewed, 11 men and four women. Almost all the men interviewed had worked in construction before losing their jobs, while the women had been employed as cleaners or in low-income service jobs. In this chapter, we focus primarily on the narratives of Polish migrants from the interviews, occasionally supporting our arguments with data from the survey.

10.4 The Financial Crisis, Unemployment and (Im)Mobility Patterns Among Polish Migrants in Iceland

Until recently, immigration to Iceland was relatively low and immigrants did not exceed 2% of the total population until 1998 (Statistics Iceland n.d.-b). A process of privatisation and deregulation of the economy in the early 1990s brought brisk economic growth, seen particularly in the major expansion of the construction industry in the early 2000s. This created substantial shortages of workers on the labour market and led to increased immigration to the country (Skaptadóttir 2011). Besides construction, foreigners were employed mostly in low-income jobs in the service sector, such as cleaning, shop assistance and less-skilled jobs in health care – for instance caring for the elderly in nursing homes. Many were employed in manufacturing, particularly in food production. Consequently, in January 2008, immigrants accounted for 9% of the total population and constituted a tenth of the Icelandic labour force. Polish migrants were by far the largest migrant group – or about 40% of all immigrants registered in Iceland in 2008 – making up 3% of the total Icelandic population (Statistics Iceland n.d.-b). At the time, the unemployment rates among Polish citizens were negligible and, on average, lower than those of the overall population. In the aftermath of the financial crisis of 2008, this changed considerably, when unemployment rates reached 18% among Poles in 2009, twice as high as the rate for Icelandic citizens (8.2%) (Directorate of Labour n.d.). The sudden contraction of the economy following the financial crash slowed down immigration to Iceland and a number of Polish workers who had lost their jobs left the country, either returning to Poland or moving to other countries – for example to Norway – where they hoped to find new employment. In 2009, for the first time since 1992, net migration between Poland and Iceland was negative (-1583 persons), with more men than women leaving the country (Statistic Iceland n.d.-b). The scale of the outflow could, however, have been larger, since the official statistics include only those persons who were officially registered as residing in Iceland but omit those who have a so-called temporary personal ID number (*utanþjóðskráar kennitala*), which applied to a number of posted workers. Yet although many Poles left the country, their emigration and that of other foreign citizens was not as extensive as anticipated by the general public or as presented in the media at the time.

There were many reasons, including non-economic motives, which influenced the decisions of foreign citizens who became unemployed in the aftermath of the financial crisis to stay in Iceland (Skaptadóttir 2014; Þórarinsdóttir et al. 2009; Wojtyńska and Zielińska 2010). For instance, some had already settled in Iceland, brought their families with them or entered relationship with Icelandic citizens. However, even those who saw their migration as temporary tended to evaluate their options, based not only on the situation in Iceland but also on their prospects in Poland. In their analysis of post-crisis mobility patterns among Polish migrants, Janicka and Kaczmarczyk (2016) conclude that the considerable income disparities between Poland and Western European countries still encourage outward population flows from Poland and can deter return migration (with average monthly salaries in Poland amounting to about half of those in Germany or the United Kingdom). Measured by GDP, Poland is usually presented as one of the countries not affected by the global economic recession in 2008. However, as argued by Maciejewska et al. (2016), the crisis in Poland had a 'silent and crawling' character. In response to the global financial crisis, Polish policymakers focused on expanding the flexibility of employment in order to continue attracting foreign investment and maintaining economic growth. Thus, the measures taken by the government to prevent a recession did, in fact, put downward pressure on wages, social security and the labour market and promoting, instead, insecure and precarious employment. Moreover, the unemployment rate in Poland increased to 13.4% in 2012 and even reached 20% in some regions (GUS 2014; Wojnar 2012).

Consequently, the reasons that pushed many Poles away from their home country became even more acute during the recession, thus significantly restraining return migration. Many of the Poles we interviewed in Reykjavik doubted whether they could get any job at all, let alone a job which they would find acceptable and which would allow them to meet their needs. Moreover, many believed that the situation in Iceland would soon improve, while often expressing great scepticism regarding the situation in their home country and frequently indicating that there is a 'permanent crisis in Poland'. Therefore, even though they had lost their jobs, they felt more economically secure in Iceland, especially if they were eligible for welfare-protection benefits.

Since Iceland opened its labour market to citizens of the new EU member states in May 2006, the migration of Poles to Iceland has been regulated by general EU rules governing the intra-EU mobility of labour, including its social-protection schemes. Polish citizens who have been granted legal residency are incorporated into the Icelandic welfare system after a 6 month stay in the country. Their unemployment rights are, however, linked with their membership in labour unions. After 12 months of full-time employment, they earn the right to full unemployment benefits. However, a person is already entitled to partial benefits after working in Iceland for a minimum 3 months in an at least a quarter-time position.

Although the capacity of the Icelandic welfare scheme is more limited than those in the other Nordic countries (Ólafsson 2005), it can still be described as generous compared to that in countries like Poland. Moreover, during the financial crisis, growing unemployment was recognised as one of the central issues to be addressed.

In response to the crisis of 2008, rights to unemployment benefits in Iceland were extended, first to three years and then to four years in 2010. After 1 January 2015, unemployment benefits were shortened to two and a half years or 30 months. For the first 3 months, benefits are wage-related and calculated as 70% of the average income based on the 6-month period ending 2 months before a person becomes unemployed (Directorate of Labour n.d.). After 3 months, unemployed individuals are paid a flat amount in basic benefits. In 2011, when the interviews on which this discussion builds were conducted, the basic benefits were about ISK 160,000 (EUR 973), amounting to 52% of the median salary in Iceland at that time. The benefits are about ISK 280,000 (EUR 2032), which corresponded to about 70% of the median salary in 2018 (own elaboration based on Statistics Iceland n.d.-a).

In comparison, in the past decade, Poland offered six to 12 months (180–365 days) of unemployment benefits (Pątek 2017). In 2011, the amount of unemployment benefits during the first 3 months equalled 22% of the average gross salary and 18% in the following months (own calculations based on GUS 2014). In 2018, the benefits were PLN 847.8 (EUR 197) for the first 3 months (17% of the average gross salary) and PLN 665.7 (EUR 154) in the following months (14% of the average gross salary). Based on EU regulations, immigrants can move their acquired rights between member states. However, Poles are eligible to receive benefits at the Icelandic level for only three consecutive months, after which they are subject to Polish unemployment arrangements. Thus, moving unemployment benefits from Iceland to Poland would clearly compromise the household income and economic situation of Polish migrants and their families to a considerable extent. At the same time, their employment possibilities in Poland, like those that motivated their emigration in the first place, would remain limited.

Finding work in Poland would not necessarily secure an adequate financial situation, as aptly illustrated by the case of Krystyna (pseudonym), a middle-aged Polish woman, whom we interviewed in 2010 in Iceland. When she lost her job there at the beginning of the economic recession, she decided to return to Poland. She took a manual job in a small factory in her native town, where she said she was paid PLN 5 per hour (about EUR 1.5 at that time). In an interview, Krystyna recalled the moment when she received her first salary for this job. She said it had felt like being on the edge of a nervous breakdown, concluding: ‘I cannot keep working for so little money’. She quit her job in Poland and went to Sweden for 2 months where she earned money picking berries. ‘It was only a summer job, but one needs to live somehow’, she said, explaining her decision to move from Sweden back to Iceland. After she returned to Iceland, she worked for 3 months before becoming unemployed again. However, this time she chose to stay in Iceland and use her right to unemployment benefits.

Typically, migration has been applied as a strategy to compensate for the deficiencies of the local labour market and its capacity to provide enough income to secure the welfare of the household. Many Poles used the wages earned in Iceland to provide for families who lived in Poland. While earlier studies on Polish migration showed that remittances were chiefly used for everyday expenses and to cover unexpected additional costs like house renovation (Kaczmarczyk 2004), they were

also used to meet other inadequacies of the Polish social-welfare system – in particular, old-age pensions or access to higher education. Some of our informants mentioned that they wished to work in Iceland to secure their retirement benefits or to support their elderly parents (cf. Krzyżowski and Mucha 2014). Another recurrent topic in the interviews was the need to finance children's education – almost half of all university students in Poland need to pay for their education (Natalli 2015). In 2013, the average university fee was around PLN 8100 (EUR 1955) per academic year. Based on the data from a survey among fifth-year students in the Economics Department of Szczecin University, Wojciech Jarecki (2012) concluded that a considerable portion of students' budgets comes from parents. Since not all parents are able to support children with the salaries they earn in Poland, some choose to seek higher wages abroad.

The need to facilitate the education of his children was very prominent in the narrative of Stanisław, a man in his 50s, who had been working for a year in the Icelandic construction sector before he became unemployed. At the time of the interview, he was actively looking for a job but, because the financial crisis had resulted in contraction in the building industry, there were no openings in his field. As Stanisław explained, he had come to Iceland mainly because he wanted to earn money for his daughters' education. He said, 'I don't know if it will secure a job for them in the future, but it is better to sweep floors with a diploma than without one'. Although he did not intend to settle in Iceland, he concluded 'I came here with a very specific purpose – to educate my children – and I will stay here until I reach my goal'. He elaborated on his decision to stay in Iceland despite the economic recession in the following way:

> To be honest, I now consider Iceland my second fatherland, because it gave me what Poland did not give me. (…). A good life for me and my family. I mean a normal life, because this is not about abundance but about earning enough to last from the first to the last day of the month; for the basics – food, a flat and the education of my children. (…). [After the crisis], it is worse here. The prices rise, inflation is very high. But still, there are normal relations. I can even save about 400–500 euros per month. This is money I would never earn working in the town I come from. (…). I would like to go back, but I am terrified that then my children would not be able to study.

Given that peoples' decision to move from Poland to Iceland was commonly motivated by a need to improve their or their families' financial situation (the overall welfare of the family remaining in Poland), staying on benefits could still help them to meet this goal and fulfil their financial and care responsibilities towards the family. The cases of Krystyna and Stanisław demonstrate that many of the Polish migrants who became unemployed still felt financially more secure in Iceland than they would be by returning to Poland. Ironically enough, because migration was mostly driven by the availability of jobs in the low-wage sector of the Icelandic economy and many migrants were paid at or below the minimum-wage level (Friberg et al. 2013), they did not experience a major deterioration in their monthly income after transferring to unemployment benefits.

Interestingly, the financial security that Stanisław equated with the ability to lead a 'normal life' (Dzenovska 2014) engenders a sense of belonging that makes him

call Iceland his second fatherland. Although he wished to return to Poland at some point, as he mentioned in the interview, he expressed his disappointment at his native country apparently failing to fulfil its duty to ensure decent survival. This also shows that attachments are built not only on the basis of social and cultural affinity but also on a sense of security – being able to provide for oneself and one's family – or to fulfil one's aspirations for a good ('normal') life.

The financial crisis, combined with the Icelandic social-protection environment, had certain implications for the mobility patterns of Polish migrants. As already mentioned, many of them, especially single men, left the country during the recession but others still considered the situation in Iceland more favourable than the one they could expect back in Poland. Losing a job and having fewer job opportunities did not simply mean return migration – it even, to some extent, seems to have underpinned family reunification and hence more settled migration. The sudden and sizable decrease in the value of the Icelandic *króna* against the Polish *złoty* (and the euro) affected the value of migrants' savings and the remittances they were sending to Poland. A survey, conducted in 2010, showed that 30% of the unemployed respondents were living in divided households and that 38% reported sending money to their country of origin (Wojtyńska 2012). This was a considerably lower percentage compared to findings from a survey of remittances conducted right before the crisis (in 2008), when 56% of respondents were engaged in this practice (Jónsdóttir et al. 2009). One reason for the smaller number of people making transfers to Poland is the reunification of families following the financial crisis; another explanation is the inability to save enough money to send to Poland, which was mentioned by 39% of the unemployed respondents in the above-mentioned study. Consequently, some of the Polish migrants we interviewed explained that, with the lower value of the wages earned in Iceland, it was too expensive for them to maintain two households and continue a transnational way of life, so they brought their families to Iceland.

10.5 Mobile Workers Facing the National Logic of Welfare Regimes

Engbersen et al. (2017, 344) argue that 'the heterogeneity and diverse temporalities of intra-EU mobility set new challenges for the European destination regions and cities'. Many Polish migrants are undecided about their future, adjusting their strategies and mobility-versus-settlement patterns in response to the changing economic situation and the available resources in the sending and receiving countries. While living in Iceland, many maintain social linkages with and care responsibilities towards family – frequently children or aging parents – and/or relatives who stay in Poland, as we described in the section above. Even if they were unemployed, some migrants had a better likelihood of meeting these responsibilities if they remained in Iceland. At the same time, state welfare policies, which are largely organised

according to national and sedentary logic, do not accommodate this transnational nature of migrant lives (Righard 2008). National ideology informs not only formal eligibility rules but also the practices and attitudes of the welfare-service personnel responsible for allocating both state- and third-sector-provided services.

Increasingly, the internationalised labour market, including intra-EU labour mobility, typically entails the formation of transnational social fields that span multiple nation states. This means that the living realities of transnational migrants typically cross national borders. Being socially embedded in different localities, migrants engage in back and forth travelling, regularly visiting their families or relatives living in Poland. Although part of their free time, visits are primarily undertaken in response to family and care obligations, which might be even more acute in cases where there are divided households (Wojtyńska and Skaptadóttir 2020). However, the rules regarding eligibility for unemployment benefits in Iceland may require modification of the mobility practices common among migrants prior to the crisis. A person registered as unemployed is generally defined as someone who is active in the labour force and, as such, is actively searching for work and available to accept any job offers presented by the authorities. However, job-seeking intrinsically implies looking for work in Iceland. The unemployed person must also be ready to participate in various meetings, courses and activation programmes sponsored by the Icelandic Directorate of Labour, which requires that the person is present in Iceland when the employment office contacts him or her.

The employment office utilises different methods to control whether or not a person meets these obligations. Job-seekers need to 'report' monthly to the Icelandic Directorate of Labour. This reporting can be done on-line but it must be done in Iceland and the Directorate of Labour checks IP numbers to trace the location of the computer the job-seeker uses to register. This of course does not mean that people cannot travel abroad while unemployed but that they are required to notify the office whenever they intend to leave Iceland; this period is then categorised as holiday and reduces the amount of benefits. If people do not report their travel or are discovered reporting from abroad, they risk losing their unemployment benefits – as a result, migrants may be constrained from visiting their families in Poland to avoid this happening.

These rules apply equally to Icelandic and foreign citizens. Nevertheless, they conflict with the nature of transnational living pursued by many migrants by reducing a migrant's visits home for solely leisure activities and penalise each trip to Poland in some way. Moreover, foreign citizens are apparently subjected to additional scrutiny, precisely because of their transnational practices and the greater likelihood of travel abroad. As one employee of the Icelandic Directorate of Labour told us in an interview: 'We contact people at a short notice to make sure they stay in Iceland. We don't want to sponsor holidays in Poland for them'. Consequently, unemployed foreign citizens registered with the office are occasionally called in for sudden and unexpected checks, as Ola, one of our informants in her 30s, explained:

> I remember, I once got a notification. I had just registered that I was going on holiday from unemployment, since I was going to Poland. I had holidays from the 9th [of the month], and on the 5th [same month] I had to come to the office, just [a few days] before my flight. I got this message at 8 o'clock in the evening of the day [before] they wanted me to come; I had to come at 1 pm the next day.

Due to their EU citizenship, Polish migrants are entitled to Icelandic public-welfare services but they still encounter various social boundaries when seeking formal assistance. Robert, another of our participants, cited his experience of irregular and often hostile attitudes on the part of office workers at the Directorate of Labour. Robert lost his job in a bakery right before completing the 3 years' employment that would have allowed him to turn his temporary contract into a permanent one. He complained that he felt information had been repeatedly withheld from him and that he had been misinformed about regulations or changes in the rules regarding unemployment arrangements; this had ultimately put his eligibility at risk (it cost him his right to benefits). In general, an unemployed person has the right to combine paid work with unemployment benefits but he needs to notify the Directorate of Labour so that the amount of benefits can be reduced proportionally. According to the information which Robert received at the initial meeting with the Directorate of Labour, it was alright to notify the office afterwards. However, when he delivered his payslip regarding the additional work he had undertaken, it turned out that he should have done so *before* the work was performed. He concluded:

> I don't understand this, why they never tell us when they implement some new rules. (…). I am not sure, but maybe they just wait until you make a mistake and lose benefits. Then they are happy to have one less person to support. It is true. They just treat us [foreign workers] as a commodity.

Robert also felt that he does not receive enough assistance from the office when looking for work, being treated differently to – in his opinion – the Icelandic unemployed who, he claims, are more likely to receive alerts about new job openings.

We observed similar resentment among some of the charity workers whom we interviewed in our research. There are various third-sector organisations that provide food and other assistance for people in need and many unemployed Poles were told to seek help from them in the aftermath of the financial crisis. Since Poles were often informed about this assistance at the Directorate of Labour office, many considered this part of the state provision for the unemployed. Not all migrants had worked long enough in Iceland to earn the right to full benefits and, with reduced payments, some faced considerable financial hardship. The sudden increase in foreign citizens among the clients of charities was met with scepticism by some charity workers, as illustrated by the following quote:

> Yes, after the crisis, these people began to be visible already in 2008 and it was men… men who were imported, literally – and that is a problem. There are many problems resulting from this because they have lower wages than Icelandic men.

In the eyes of many charity workers, migrants were often reduced to the status of temporary labourer and their low wages were seen more as a 'problem' than as an explanation for why they might be seeking help. Although there are no formal criteria for clients to receive assistance, some charities began asking Polish citizens to present confirmation of their registration as unemployed with the Directorate of Labour (ironically reinforcing migrants' idea that charities were part of the services for the unemployed). One charity introduced different waiting lines for Icelandic and foreign citizens. These new forms of scrutiny were clearly designed to control

and restrict access to their services. The distrust on the part of charity workers, who often did not see migrants as rightful clients, clearly reflects existing social boundaries that define migrants as less than full members of Icelandic society (cf. Rice and Wojtyńska 2018).

The attitudes of service workers towards unemployed foreign citizens – both as revealed in our interviews and as perceived by the Polish migrants themselves – clearly indicated that there were certain ideas about deservingness. The rhetoric of eligibility is based less on formal membership of a group and more on a subjective notion of someone belonging to a 'community of value', one 'comprised of people who share common ideas and (exemplary) patterns of behaviour expressed through ethnicity, religion, culture or language' (Anderson and Hughes 2015, 2). It would seem that the prevailing image of migrants as mainly temporary labour defines them as not fully belonging to Icelandic society and thus not entirely deserving of social assistance unless they demonstrate a readiness to integrate.

Likewise, the nation-centred logic informs a large share of the activation programmes and courses offered by the Directorate of Labour, services which are mainly focused on improving Icelandic language skills and knowledge of Icelandic society. Hence, they focus on integrating migrants into Icelandic society as measures to help them to find employment. While intended to improve migrants' employment possibilities by making migrants fit the demands of the Icelandic labour market, such activation programmes indirectly instigate migrants' permanent settlement. This again shows how the organisation of a national welfare system tends to be at odds with migrants' mobile practices, the intra-European labour mobility regime and the neoliberal demand for flexible labour (Righard 2008). Moreover, Icelandic courses – even if undoubtedly helpful for those willing to improve their language skills – can also be perceived as another way to 'discipline' the foreign unemployed. They are obligatory and, if a person misses class, benefits are suspended until the absence is explained. If the absence is not explained, the benefits are deducted.

10.6 Conclusion

The growing demand for migrant workers within the intra-European common market under neoliberal governance fosters a greater cross-border mobility of people, resulting in individual living realities stretching across different nation states. While work abroad provides opportunities for socio-economic betterment, transnational households typically emerge in response to low-wage and insecure employment in the destination countries. Many migrants conceive of their work abroad as a temporary strategy – this imagined temporality is often reinforced by employers' recruitment strategies, migration policies and social boundaries that often deem migrants as not belonging. Conversely, as the last financial crisis showed in the case of Polish migrants in Iceland, people adjust their mobility and settlement patterns in response to social risks in their countries of origin, as well as conditions in the countries of

destination, in that way negotiating between aspirations and available opportunities (Schewel 2019). Despite losing their jobs, many of the unemployed Polish migrants still found better social protection for themselves and their families in Iceland compared to what they could expect if they had chosen to return to Poland. Given their EU membership, immobility rather than return migration gave them access to a combination of state and third-sector social-support arrangements in Iceland. This shows that, counter to its initial intention, the EU Benefit Scheme may contribute to a more permanent stay, especially in the context of migration from less- to more-generous welfare states. However, this is not the only contradiction inherent in contemporary labour migration.

Our study also demonstrated an ambiguous relationship between migrants' alleged temporality – which was largely framed by employers' recruitment strategies – and migrants' actual practice, which resulted from efforts to fulfil their welfare responsibilities. Furthermore, there is an apparent tension between a transnational way of living (whether desired or enforced) and the national logic of welfare provision in member states. Organised by ideas of sedentariness, national membership and social cohesion, welfare states take little account of the transnational character of migrants' lives. This is revealed on many levels, for instance in formal eligibility rules and in institutional practices and attitudes on the part of social-welfare-service personnel, all of which may hinder access to social protection. It also becomes apparent in the rhetoric of deservingness, where foreign citizens and mobile individuals (because of their assumed temporality) tend to be disregarded as legitimate beneficiaries of support.

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Chapter 11
Puzzling Social Protection across Several Countries: Opportunistic Strategy or Risky Compensation?

Polina Palash and Virginie Baby-Collin

11.1 Introduction

While research on social protection in transnational families mainly focuses on arrangements between the origin and receiving countries, few studies address how this occurs across multiple countries. In an era of increasing mobility and transnationalisation, flows of people and resources are not limited to bipolar movements between origin and destination but also entail complex, fluid and circular patterns (Baldassar and Merla 2014; Cortes and Faret 2009; Fréguin-Gresh et al. 2015) with onward and multiple moves (Toma et al. 2015). The 2008 global recession left a clear mark on some of these mobility configurations (Mas Giralt 2016; Ramos 2018), with readjustments and reversibility of flows (Moreno-Márquez and Álvarez-Román 2017), resulting in more complex transnational social-protection (TSP) arrangements.

It is possible to identify at least two reasons for the limited number of studies on TSP arrangements across multiple countries. First, this kind of study is quite demanding in terms of time, means and energy, as a comprehensive understanding of TSP practices requires both a fine multi-sited ethnography and the awareness of contextual specificities (Palash and Serra Mingot 2019; Toma et al. 2015). Secondly, the analytical process is challenging because it requires tracing and capturing more complex and dynamic provision flows in their various directionalities and intensities,

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while also being able to assess their different nature, levels and temporal readjustments (Fréguin-Gresh et al. 2015; Schier 2016).

Among the few studies on the management of an extended TSP space by transnational families, the main framing seems to apply to its optimisation and profitability (Bryceson 2019; Ma Mung 1999; Ong 1999; Trémon 2011). This framing appears to echo the assumptions of the 'welfare magnet hypothesis' or 'welfare tourism', implying the opportunistic use of different welfare systems by migrants (Borjas 1999; Fernandes 2016). Other studies, however, show that families enlarge their TSP space to address basic social-protection concerns in times of crisis. Yet, they also show that migrants, rather than accumulating resources, are exposed to job precariousness (Fréguin-Gresh et al. 2015; Mas Giralt 2016; McIlwaine and Bunge 2019; Ramos 2018) and a more challenging organisation of social-protection concerns across borders (Schier 2016; Serra Mingot and Mazzucato 2019).

Ecuadorian transnational families have recently experienced a reconfiguration of their TSP arrangements between Europe and their origin country as a consequence of the 2008 recession (Mas Giralt 2016; Moreno-Márquez and Álvarez-Román 2017; Palash and Baby-Collin 2018; Ramos 2018). Since the beginning of the sustained outmigration from their country of origin at the end of the 1990s, pushed by the financial default linked to the dollarisation in Ecuador, Spain became the main destination for some 479,117 Ecuadorian citizens as of 2009, the greater part of whom naturalised as Spanish citizens (Iglesias Martínez et al. 2015). Apart from favourable naturalisation schemes in Spain, Ecuadorians – like other Latin Americans – can also benefit from an Agreement on Social Security, guaranteeing the portability of their pension rights between Spain and their country of origin (OISS 2019). Although many Ecuadorian migrants managed to reunite with their kin in Spain, many have also experienced downward social mobility and gendered employment segmentation, concentrating mainly in construction, agriculture and hotel and domestic services (Iglesias Martínez et al. 2015).

After 2008, however, the global recession destabilised their life in Spain, due to soaring structural unemployment and the burst of the real-estate bubble. This implied a reconfiguration of their migration projects, with some deciding to return to Ecuador (Moreno-Márquez and Álvarez-Román 2017) while others choosing to migrate to other destinations, making use of their newly acquired EU citizenship (Iglesias Martínez et al. 2015). Accordingly, the number of Ecuadorians in Spain dropped by 14% to 411,897 individuals by 2019 (INE 2019).

Estimates on the return migration from Spain to Ecuador range between 65,000 and 85,000 individuals overall, which is perhaps not as high as one would expect, given the incentives of return schemes of both sending and receiving governments (Moreno-Márquez and Álvarez-Román 2017). Despite improvements in social policy over recent decades, Ecuador still presents important challenges, with low pensions and welfare benefits with respect to the cost of living and inefficiencies of the public healthcare system (Naranjo Bonilla 2014). For these reasons, a fundamental source for ensuring social-protection needs in Ecuador is migrants' financial transfers from abroad, which are often deployed to pay for private, more efficient services (e.g. Palash and Serra Mingot 2019).

England has become one of the main destinations for the secondary migration of Ecuadorians from Spain. Although Ecuadorians have been present in the UK since the 1970s, many of them have been invisible in the statistics due to their undocumented status. Established ethnic networks and the more-stable labour market served as the main incentives for this onward movement. However, as it turned out, Ecuadorians in the UK are subject to an even greater downward mobility than in Spain, with both men and women mostly relegated to the precarious cleaning sector (McIlwaine and Bunge 2019).

In terms of formal social protection, the liberal Anglo-Saxon welfare system contrasts with the Spanish Southern European familist one (Hemerijck et al. 2013), and there are no social security agreements between the UK and Ecuador. Although not as severely as it occurred in Spain, the British welfare provision has been subject to austerity measures, resulting in the inhospitable and exclusionary Brexit context (e.g. Mas Giralt 2016). Secondary migration from Spain to the UK has therefore implied a reconfiguration of TSP arrangements among Ecuadorian families, encompassing at least three countries with their specific social-protection systems. Therefore, this contribution seeks to fill the gap in the literature regarding the management of social protection by transnational families across multiple countries. How do Ecuadorian families organise their TSP arrangements across multiple countries? Does this management of TSP mainly imply opportunities or constraints for families facing recurrent contextual destabilisation? In order to account for both the individual and family perspectives, as well as their interactions with the specific contexts, we integrate a socio-spatial approach and a circulation framework, applying the concepts of care circulation (Baldassar and Merla 2014) and circulatory capability (Fréguin-Gresh et al. 2015).

We draw on two emblematic cases out of 36 transnational families in which TSP arrangements are managed across several countries. After outlining the theoretical framework, we describe our research methods in more detail. This is then followed by a presentation of the case studies and their discussion. We end our argument with several concluding remarks.

11.2 Managing an Enlarged Transnational Social-Protection Space

In an increasingly mobile and interconnected world, concerns over social protection have increasingly extended across national borders. Transnational social protection (TSP) refers to ‘the policies, programmes, people, organizations, and institutions which provide for and protect individuals […] in a transnational manner’ (Levitt et al. 2017, 6). Despite living in different countries, transnational families – who represent an increasing social reality – often pursue welfare and social-protection goals which stretch beyond borders (Bryceson 2019; Bryceson and Vuorela 2002). Their TSP arrangements ‘from below’ relate to cross-border strategies sustained by

network members living across different countries to cope with risks and cover needs related to areas such as income and livelihood, health, care, education and housing (Amelina et al. 2012; Palash and Baby-Collin 2018).

Although the migration literature mainly focuses on migrants' economic transfers addressed to secure the social-protection needs of their families back home, scholars using a transnational lens have recently acknowledged the role of 'reverse remittances' (Mazzucato 2011). These mainly relate to services, such as those linked to the care of migrants' children left behind, to properties and, to a lesser extent, to goods and money. In effect, in the context of the recent global recession, evidence shows that precarious migrants in Europe may rely on 'reverse economic flows'. These include economic remittances from migrants' families back home and migrants' own financial means transferred from their origin countries in order to ensure their social-protection needs (Palash and Baby-Collin 2018).

Thus, TSP provisions are not limited to economic unidirectional transfers but imply a care circulation, as the 'reciprocal, multidirectional and asymmetrical exchange of *care* [that] fluctuates over the life course within transnational family networks subject to the political, economic, cultural and social contexts of both sending and receiving societies' (Baldassar and Merla 2014, 22). This encompasses extended family networks bound in mutual engagements and responsibilities shaped by social norms and working over large timeframes (Palash and Baby-Collin 2018; Palash and Serra Mingot 2019; Serra Mingot and Mazzucato 2019).

Transnational families combine diverse means from their multi-localised 'resource environments', originating from diverse sources such as the family and other informal networks, the state, the market and the third sector (Levitt et al. 2017). However, these social-protection environments may also imply constraints – linked to national migration, welfare and employment regimes and conditions – which often motivate cross-border arrangements (Fernandes 2016; Trémon 2011). Moving forward with the conceptualisation of resource environments by Peggy Levitt and her colleagues (Levitt et al. 2017) and considering space as '*socially produced'(*Massey 2005*),* we propose the concept of 'transnational social-protection space'. This refers to *the space of* interactions between the *actors engaged in social-protection practices and related social-protection* environments. We intend such space to be anchored in specific places which shape and are shaped by the practices of its actors, thus territorialised (Baldassar and Merla 2014) and implying negotiations of belonging, exclusion, appropriation, conflicts or cooperation. This may relate to welfare and social-protection concerns (Rosignoli 2019; Serra Mingot and Mazzucato 2019), depending on diverse factors such as socio-economic and legal status, age and gender (Levitt et al. 2017).

Moreover, TSP arrangements are not limited to the 'classic' TSP space between the origin country and one destination country only but sometimes span across several countries. This is shown in only a few focused studies, such as those on Sudanese families between their origin country, the Netherlands, and the UK (Serra Mingot and Mazzucato 2019), and on Nicaraguan families between Nicaragua, Costa Rica, the United States and Panama (Fréguin-Gresh et al. 2015). As both studies highlight, this involves a complex coordination between network members

and more composite and multi-directional flows of people and resources linked to multidimensional social-protection areas. This shows that, in the globalisation era, flows of people and resources are more complex, circular and fluid (Cortes and Faret 2009). Navigating a TSP space depends on different 'circulatory capabilities' (Fréguin-Gresh et al. 2015), shaped by both the external contextual conditions and the inner family needs and logics (Palash and Serra Mingot 2019).

Research on the management of an extended TSP space by transnational families tends to frame it as profitable. For example, Bryceson (2019) distinguishes between 'multi-transnational' families (spanning over more than two countries) which, in comparison to 'bi-transnational' families (involving only two countries) are advantaged through their skills and education, providing transnational socio-economic opportunities. Several empirical studies on Chinese transnational families are in line with this perspective, assuming a more strategic use of an enlarged TSP space. Among these, Ma Mung (1999) points out their optimisation of spatial resources through geographic dispersion. Trémon (2011) and Ong (1999) elaborate respectively on 'flexible parenthood' and 'flexible citizenship', understood as migrants' opportunistic strategies to secure resources in other countries through an advantageous naturalisation. Such framings appear to echo the assumptions of the 'welfare magnet hypothesis' or 'welfare tourism' (Borjas 1999; Fernandes 2016) about migrants' use of welfare-related resources in Western countries, although sometimes challenged by evidence (Fernandes 2016; Giulietti 2014).

Several other studies, however, contradict the framing of the successful and profit-seeking behaviour of transnational families dispersed across multiple countries. For example, members of Nicaraguan families originating from poor rural areas, who migrate to several destinations to improve their situation, experience job precariousness and informality (Fréguin-Gresh et al. 2015). McIlwaine and Bunge (2019) elaborate on the 'onward precarity' of post-crisis moves by Latin American migrants from Spain to the UK who, in their trajectories and despite the privileges of holding Spanish citizenship, instead accumulate vulnerabilities (see also Ramos 2018). Even German middle-class families face difficulties in the organisation of their transnational life in and outside the EU with respect to national regulations and welfare (Schier 2016). This contribution builds on and expands these discussions, using the specific case of the TSP space of Ecuadorian families spread across Ecuador, Spain and the UK.

11.3 Research Methods

We draw on a multi-sited fieldwork ethnography conducted over 14 months between 2015 and 2016 with Ecuadorian families in Spain (Barcelona), England (London), and Ecuador (including Quito, Guayaquil, Milagro, Cuenca, Baños, Ambato and Santo Domingo). The management of TSP has been studied among 63 families whose members were living in Ecuador and at least one European country (Spain or the UK). These TSP practices appeared to be spanning over at least three countries

(Ecuador, Spain, the UK and/or other countries) in 36 families out of these 63. We base our analysis on two emblematic cases, whose members have been interviewed both in Europe and Ecuador, through a matched sample technique.

Research participants were recruited in Europe through multiple gatekeepers and snowball sampling with diverse starting-points, including associations of Ecuadorians, community events, places frequented by the community members in Barcelona and London and personal contacts. The sample included mainly working-age migrants, both men and women, aged 20–60 years old, encompassing both low socio-economic-status migrants (employed in unskilled jobs, often due to downward social mobility) and, to a lesser extent, professionals in high-skilled jobs. Most of them had a legal status in Europe, holding Ecuadorian-Spanish dual citizenship. In terms of family structure, the sample included couples, with or without children and, to a lesser extent, single parents or single-member households.

The families' socio-economic status is considered globally, including the situation of family members in both Ecuador and Europe, since these are often interrelated. This is observable over time, for example for migrants with economically self-sufficient families in Ecuador who better resisted downward social mobility in Europe, accumulating more assets (e.g. property) over time and reflecting better social protection conditions overall. Likewise, the socio-economic status of families in Ecuador evolved over time – related, for example, to migrants' implications in eventual support from abroad. Thus, we distinguish between two main socio-economic status categories: lower and higher socio-economic-status families. The first and most numerous group included migrants employed in low-skilled jobs in Europe, with dependent family members in Ecuador. On the other hand, a smaller group included migrants who were better integrated socio-economically in Europe and who better resisted downward mobility, often working in qualified jobs (at least up to the 2008 recession). They generally had self-sufficient families in Ecuador and were distinguished by the availability and use of reverse economic flows from Ecuador.

Interviews were conducted by the first author (Polina Palash) in Spanish in respondents' homes, neighbourhoods, bars and, more rarely, at job sites in informal settings. They lasted between one and several hours and were partly recorded, partly registered by note-taking during or after the meetings. Discussions encompassed, on the one hand, TSP practices between migrants and their scattered family members and, on the other, their access to extra-familial resources of social protection (state, market, third sector or other social networks). Interviews with families were supplemented by participant observation of various duration made during community events, in respondents' homes or, more rarely, at their workplaces.

11.4 Balancing TSP Between Here, There and Beyond

The complex management of social protection concerns across multiple countries is differently managed by the two types of families defined above, as Juan's and Ramon's cases illustrate.

11.4.1 Juan's Family

I first met Juan (61) at an NGO at which I was volunteering in London and afterwards we also met several times in bars and a restaurant in the Elephant and Castle shopping centre area, known as one of the most popular gathering places for Latino migrants in London. 'They call me the eternal traveller', Juan told me. In Quito, where he completed a university degree in business administration, Juan was a department head in a multinational enterprise, while his wife Luisa was a professor at a prestigious college. Due to the crisis in Ecuador and before moving to Spain with his family, he also worked for a period in the US in the late 1990s.

They migrated to Spain in 1998, where Juan found work as a breeder, while Luisa created an informal kindergarten for the children of workers living in their neighbourhood. After some years, they reunified with their two children, previously cared for by Juan's in-laws. In 2008, both children returned to Ecuador for study and personal reasons. Juan and Luisa remained in Spain, supporting their children's private university studies in Quito, while coping with a worsened labour situation in the aftermath of the 2008 crisis.

Because they also suffered emotionally from the separation from their children, the couple decided to return 'back home' in 2011. At their age (over 55), starting a life anew in Quito proved to be difficult, since they could not find a job. Moreover, Luisa had a health issue and the medication she needed was expensive in Ecuador. Fortunately, they were helped by their siblings who sent them more affordable medicines from Spain. Although their adult children had jobs, their salary, amounting to about US$ 400 a month, was not enough to afford the cost of living in Quito.[1]

In response to these hardships, Juan decided to return to Spain, this time alone, where he soon found out that the labour situation had even become worse. His children could not move with him because they did not hold Spanish citizenship, while his wife could not join him because of her illness.

Having family ties in London, he decided to move there in 2011, helped by a cousin who found him a job as a cleaner. Although this income made it possible for Juan to support his family in Quito, his job situation was challenging. Having to combine several partial jobs in the cleaning sector, he was busy the whole time

[1] The basic food basket in Ecuador has recently been estimated to be around US$ 700, while the basic salary in 2018 was US$ 386. See http://www.ecuadorencifras.gob.ec/canasta/; http://www.trabajo.gob.ec/ministerio-del-trabajo-establece-salario-basico-unificado-2018/

going from one job location to the next, often in neighbourhoods located far apart. He lived in an overcrowded flat with 11 strangers and found this exhausting at his age. Juan had lived in these conditions for 3 years before he returned for another period to Quito in 2014.

However, it proved hard to earn a living for him and his children in Ecuador so, when he ran out of money, Juan returned to Europe. Resettling again in London, where I met him in 2016, proved to be difficult. He combined several flexible jobs in the cleaning sector, including working at night and at the crack of dawn. Regarding housing, he was initially allowed to stay in his cousin's house but soon had to find a place of his own while being on a very tight budget. Moreover, in order to receive his salary in his British bank account, he needed to have proof of residence, which was hard to obtain when living in shared flats. His salary was blocked by the bank and, due to all these problems, he became homeless and slept on London buses, which was how I met him at the NGO. Juan's fragmented work schedule was exhausting and sometimes he simply fell asleep at work at the end of a shift, which was not allowed and risked him losing his job. As he explained:

> I am living on the street… I have nowhere to live. Now I also have the problem that if I don't have proof of residence, how can the enterprise pay me?

He sometimes had a shower and a meal at the home of his cousin where he also stored his belongings but he could only be there occasionally, as she was sharing her place with several other people. Contacting several organisations for homeless people in London proved useless, as they were overcrowded. Juan was not used to asking for support for such basic needs:

> I have worked my whole life since the age of 12. I never, in any country where I have been, received any support, apart from unemployment benefits in Spain, which was money that I was due.

In England, housing benefits were mainly provided to families with children and, more generally in times of Brexit, welfare entitlements were increasingly restrained even for EU citizens. Amidst his misfortune, some money was sent from Spain to Juan by his brother, despite the latter's own economic difficulties. Moreover, his family in Spain also continued to support Luisa in Quito by sending her medication. Like other respondents in the UK, Juan was dissatisfied with the public healthcare services in London so, when his economic situation improved slightly, he preferred to travel and consult his usual doctor in Spain. As the Spanish healthcare provision is formally conditional on permanent residence, his brother helped to keep Juan's residence registration in his house in Spain. The downside of this was that, as he explained, it meant that his brother could no longer receive child benefits. Nevertheless, the two brothers managed to organise this arrangement for a period and, in return, Juan helped his brother by hosting him and his older son, who periodically worked in London. As it turned out, they found it hard to adapt to London life in such precarious and costly conditions and preferred to live more permanently in Spain regardless of its depressed economy.

Some months later, I met Juan's family in Quito. His wife talked about him with tears in her eyes, worried about his problems. Their present financial situation was insecure, while their retirement plans in terms of their pension entitlements were uncertain. Although over time Juan had put in many years of contributions (18 in Ecuador, nine in Spain, and four in the UK), it was unclear how or whether they would be able to gain access to them on retirement. Juan was short by just a couple of working years of the 30 years of contributions required to retire in either Ecuador or Spain. If he retired in Ecuador, where the retirement age was 60, the low pension of less than US$ 400 would not cover his monthly expenditure, estimated to be almost double that amount. In Spain, the pension would be higher but still modest with respect to the basic cost of living. In any case, he would still have to work until the age of 67, whether in Spain or in Ecuador, in order to be entitled to the total sum of his contributions through the existing social-security agreement between the two countries. Nonetheless, he had difficulty finding work in either Spain or Ecuador, whereas working in the UK implied wasting his old-age contributions. Indeed, because of the lack of any social-security agreement between these two countries, his pension contributions were not transferrable to Ecuador. Moreover, in the context of the Brexit negotiations, he ran the risk of losing even their portability to Spain. To address this, Juan was thinking about getting his Ecuadorian pension at the age of 60, which was just a few years away. This would mean travelling to Ecuador to sign the required document confirming his supposed presence, as pension benefits are conditional on local residence. Nevertheless, he also knew that it would not be enough and this is why he would prefer to reunite his family in London. However, because his children did not have EU citizenship, this was not possible. Another solution proposed by his wife was to pay voluntary contributions out of his own pocket into the Ecuadorian social-security system[2] while working in Europe, until he reached the Spanish minimum pension age. If things were to get better in Spain, he might then be able to export these Ecuadorian contributions to Spain. This situation was a brainteaser for Juan. Certainly, the whole family would find it easier to have all the resources and members gathered in one place.

11.4.2 Ramón's Family

Although with a similar background in Quito, the situation of Ramón was less desperate. I came into contact with him through another respondent whom I had met in Spain and who had a similar socio-economically privileged profile. We met in the city centre and another time in his house in Barcelona. Before migrating to Spain in

[2] This scheme allows migrants to accumulate working contributions through monthly payments to the Ecuadorian social-security system, which can later give access to a retirement pension. Thanks to the Social Security Agreement with Spain, these contributions can be exported and totalised in Spain. However, payments to this scheme, about US$ 78 a month, represents a burden for migrants (Herrera and Paredes Grijalva 2017).

2001, Ramón was a general director of a multinational company in Quito. In Barcelona, he worked as a specialised workman for the same company and, before the crisis, he managed a tourist campsite in a large city in the Catalonia region, also investing in a property in Barcelona, where he lived with his wife and two teenage children.

Nevertheless, the crisis destabilised the quite successful integration of his family in Spain and, due to financial difficulties, his spouse returned with their two children to Quito and their marriage broke up. Before their return, he occasionally paid for his father's private healthcare treatment in Ecuador; this latter was lucky enough to be entitled to a retirement pension of US$ 320 which, however, was not enough to afford local living costs, which were twice as high. Now he also had to think about how to ensure the living expenses of his nuclear family, including the education of his two children in Quito. Although his children were in Ecuador, it was not an option for Ramón to return there since, at his age, it would be hard to adapt to the Ecuadorian job market and his future pension would be as low as his father's. Still, in contrast to other Ecuadorians who faced more labour informality in Ecuador and Europe, Ramón had a good situation as far as his future pension was concerned, with about 13 years of working contributions in Spain and seven in Ecuador. Thanks to the existing agreement between these two countries, his working years could be added together in one of these two countries in order for him to access his pension.

However, Ramón struggled with periods of unemployment and precarious flexible jobs –he was self-employed as an Uber driver in Barcelona at the time of the interview. Meanwhile, he also had the burden of paying the mortgage on the property he had invested in before the crisis.

In Quito, Ramón owned two properties which were rented out and which, contrary to the Spanish real-estate trend, had benefited from a rise in value in recent years. Although he would prefer to avoid using this money which ensured the financial support of his family in Ecuador, his situation obliged him to transfer this money to Spain. At the time of the interview, he was waiting for US$ 6000 to be brought by his father, a 2-year rental income, in order to avoid being expropriated by the bank because of his insolvency in Barcelona. Nevertheless, partly transferring this income, which also ensured the needs of his family in Quito, created tension in his transnational family, with Ramon's sense of guilt linked to his support duties.

Another solution to cope with the stagnant labour situation in Spain was spending periods of time working abroad, which was made possible thanks to his Spanish citizenship. In 2014, he spent some months working in the UK, where he had his extended family. With the help of a relative, who was a manager in the cleaning sector, Ramón worked for a period in this field. However, this kind of work even implied stronger downward social mobility for Ramón and the little money he earned in cleaning was not enough to pay for his living costs in London. As he put it, 'So what's the point of going there to work and spend all you earn and have nothing left?'

The salaries and quality of life of his compatriots in the UK were degrading and he himself was no longer young enough to easily adapt to such conditions. He argued:

> I rather would seek to have the chance to work and have savings for the future, otherwise I don't see any sense. I prefer to remain in this country [Spain], where I know I have made contributions to the social security [system], I have my guarantees and Spanish nationality and I hope that things will change. But this waiting [for a job] causes me to despair because I am one of those people who are very active and dynamic.

Nevertheless, earning a living in Barcelona while having the pressure of paying his mortgage was hard and, apart from moving money from Ecuador, Ramón had to think of other solutions. He travelled to the US to explore the labour situation in Miami, where he had friends and where he believed that more opportunities were available in better-paid customer care jobs. However, this necessitated speaking English, which Ramón did not do, as well as investing substantial financial means in order to settle in the US. Furthermore, Ramón realised that the healthcare system there was not as inclusive as that in Spain, when he had an emergency and was asked to pay US$ 700 to be attended to.

In effect, despite the effects of the crisis, the Spanish healthcare system and the fact that he could combine his working years in Ecuador and those Spain, still represented important resources for Ramón's social-protection issues. However, he had to cope with the economic and real-estate crisis in Spain. Unfortunately, he could not save his property which he was forced to return to the bank, losing all the money invested in it. Still, Ramón could rely on the income from his properties in Ecuador, shared with his family in Quito, which provided an economic basis allowing him to look for other options.

11.5 The (Im)Mobility of People and Provisions in a TSP Space

These two cases illustrate stories of migrants who were affected twice by economic downturns – first in their home country and later in Spain – and whose migratory and social mobility trajectories turned out to be less successful and profitable than those reported in studies on a profitable management of TSP across several countries (Ma Mung 1999; Ong 1999; Trémon 2011; see also Bryceson 2019). For most families in this study, the motivation for extending their TSP space was prompted by a second crisis which they faced in Spain. More than being strategic and premeditated, their *onward move to the UK served as a coping strategy motivated by contextual constraints in the previous country of residence.* Today, the inhospitable Brexit context entails further insecurities for such migrants, in addition to the age-related vulnerability they face. As such, they struggle to address the risks of coping with new difficulties. For these reasons, the expansion of migrants' TSP space reflects a compensatory adaptation to constraining environments marked by repeated contextual destabilisation.

11.5.1 Differential Circulatory Capabilities

A useful conceptualisation for the analysis of extended TSP space management is Sandrine Fréguin-Gresh and her colleagues' (Fréguin-Gresh et al. 2015, 19) notion of 'circulatory capability', which has three dimensions: 'the capacity, knowledge and will of circulating and making circulating resources in a family mobility space'.

First, the *capacity* to circulate and make resources circulate is strongly influenced by migrants' and their families' socio-economic status and specific environments. However, in a TSP space encompassing multiple countries, this is more complex, involving particular challenges to migrants' capacity to ensure support for their scattered family members. Vulnerable families have to engage in a balancing act of allocating limited resources. In fact, when their limited resources are stretched across an extended TSP space, actors may fall short in supporting dependent family members across several countries, as occurs for Juan, who is obliged to periodically suspend support. This is different for privileged migrants like Ramón, who can rely on his financial means in Ecuador and whose scattered family members are less vulnerable.

Apart from ensuring the needs of their family members, migrants' capacity relates to their own social-protection needs as well, particularly the issue of old age. Managing social-protection issues across several countries, which do not always include social security agreements, implies a fragmentation and possible loss of entitlements, as experienced by Juan (see also Palash and Serra Mingot 2019). By contrast, Ramón can rely on economic resources in his origin country to maintain his situation in Europe (Palash and Baby-Collin 2018) and he has more freedom of choice with respect to managing his present and future social-protection concerns.

Migrants' capacity to manage TSP also depends on their legal status and citizenship. For example, holding EU (Spanish) citizenship influences Juan and Ramon's spatial mobility and transnational family life, as we saw earlier. Juan's children, who returned to Ecuador, could not join him in the UK, as they did not have Spanish citizenship. However, his case also demonstrates that, when migrants are stuck for economic reasons, as was Juan in England, having EU citizenship may lose its value as a resource. This can be the case when migrants facing precariousness cannot ensure their basic social-protection concerns through state provisions (e.g. Mas Giralt 2016).

Furthermore, migrants' age and life course also shape their capacity to manage social-protection issues. In fact, it is even more challenging for elderly migrants to adapt to foreign contexts, in particular with respect to their labour integration. Juan's predicament, ending up as homeless, sleeping on London buses and facing even more fragility in his social-protection situation due to his age, is telling.

Secondly, the dimension of *knowledge* can be linked to actors' migratory experience and the knowledge acquired through multiple migrations (Ramos 2018), in terms of the mobilisation of social networks, coping practices, integration and the environmental specificities. Having acquired knowledge, however, may not be enough for migrants to manage their TSP space when again, like Juan, migrants'

capacity to earn a decent living is affected. Although he considers the healthcare system in Spain to be better, he is stuck in the UK because of his precarious job situation and, therefore, cannot travel to access healthcare in Spain. The access to mobility allowed by his citizenship is strongly affected by the financial constraints required to move.

Migrants' awareness of the quality of particular resources in specific welfare systems is often intentionally linked to 'welfare magnet' and 'welfare tourism' framings (Borjas 1999; Fernandes 2016). For respondents in this study, however, it is not so much the knowledge of welfare resources in the UK which can be accessed thanks to the Spanish citizenship which motivates their onward moves but the hope of ensuring their employment and the chance of relying on family networks in London (see also Fernandes 2016; McIlwaine and Bunge 2019). Nevertheless, employment is not the same as 'opportunity', as Ramón acknowledges: the high living expenses have to be subtracted from the low wages of low-skilled jobs in London, while working contributions may not always be exportable in an enlarged TSP space. Concerning welfare provision, in the context of Brexit and austerity measures it presents shortcomings for migrants such as Juan, who consider public healthcare in England inefficient and who ensure that their medical needs are met travel back to Spain (see also Serra Mingot and Mazzucato 2019). Moreover, access to social benefits can sometimes be restricted in the destination country (see also Mas Giralt 2016) and instead reserved for families with children. As the onward migrants in our study are mostly either those with adult children or those who migrated without their children to the UK, they do not fall into this category.

Finally, another component of circulatory capability is *will*. Because the will of migrants is challenged by their capacity to be involved in providing support to scattered family members, this gives rise to negotiations on which family members or social-protection domains should be given priority. In this respect, domains like healthcare and basic income are often regarded as a priority, while stronger TSP ties tend to develop between nuclear family members, as well as between migrants and their elderly parents. However, in an enlarged TSP space the will to be engaged in support may be put to the test even more for precarious migrants. In fact, the options of Juan, during his periods of extreme precariousness in London, are limited, no matter how hard he wants to provide for his relatives. By contrast, Ramón has more options to support himself and his relatives. Still, the fact that he has to transfer money from Ecuador to Europe, money which, at the same time, ensures the welfare of his nuclear family in Quito, involves tensions in his family. Clearly, this also occurs in low-income families, affecting their relationships as well as their expectations and future reciprocity.

11.5.2 The Diffuse Circulation of Support as a Compensatory Adaptation to Constraining Environments

To understand family systems in an extended TSP space, Baldassar and Merla (2014) formulated the useful concept of the 'care circulation framework, which pertains to circular complementary reciprocity mechanisms shaped by time. Borrowing this perspective, we observe in our study a diffuse circulation of support (e.g., Palash and Baby-Collin 2018). Such a mechanism is extended in terms of the family members involved (without following direct reciprocity logics), timeframes and multiple countries over which indirect reciprocity takes place. In such TSP systems, flows of people and resources circulate multi-directionally and provisions are influenced by contextual circumstances, such as economic destabilisation and family members' needs shaped by their lifecourse. They adopt flexible readjustments with the passing on of support responsibilities and the reversal of varied provisions, as a form of social reproduction across space and time. Their flexibility is more adaptive than strategic because it is meant to compensate for constraints and risks, rather than implying an accumulation of resources (Trémon 2011). This cross-border socio-spatial adaptation also secures families' social-protection concerns. This relates both to their precarious integration in the labour market in the countries where they are located and to the challenge of having adequate welfare coverage in Europe and in their origin country.

Inequalities mark the management of social protection across borders (Lafleur and Vivas Romero 2018) and, when the TSP space is enlarged, these become even more significant. In this respect, the two sections that follow provide a comparative analysis of the distinct situations, logics and ways of managing TSP across several countries by families with different socio-economic statuses, in their complexity of spatial and temporal readjustments. These directly influence migrants' social mobility trajectories, the interaction between families and their environments, the intra-familial support and relational interplay and the perspective on TSP management as a whole.

11.5.3 Low Socio-Economic-Status Families: Thick Reciprocity and (Inter-)Dependence

For migrants whose families have been severely affected by recurring crises, managing TSP across several countries is largely a forced decision. It is motivated by the scarcity of resources in the usual TSP space and by urgent family needs such as a basic income or unexpected expenses to cover (e.g. healthcare, housing issues). As Juan's case illustrates, this may imply an accumulation of vulnerabilities and result in downward social mobility – a specific kind of 'onward precarity' (McIlwaine and Bunge 2019). Families of this type are more in need of state provisions which, in the austerity era in Europe, are compromised while, in Ecuador,

they are still quite limited. These families are more often obliged to find work on the informal market, which penalises their social security rights, while the 2008 crisis also caused major losses for those who had invested in the pre-crisis real-estate market in Spain.

At the intra-familiar level, these families are marked by great (inter-)dependence and intense and generalised reciprocity ties, marked by thick density and branching of the diffuse circulation of support encompassing the diverse and extended family members. Although the available resources are not abundant, families combine and adjust them in synergic functioning, in multi-directional resource flows requiring complex coordination (Fréguin-Gresh et al. 2015; Palash and Serra Mingot 2019; Serra Mingot and Mazzucato 2019). This is illustrated by Juan's family, whose members across the three countries try to combine a range of resources to ensure their diverse needs. Diverse provision by family members in the different countries encourages other provision at other points in time.

Nevertheless, such symbiosis implies a delicate balance. In other low-income families with mostly dependent family members, migrants experience even greater pressures, which affect their protective and relational ties. In fact, when needs and constraints are predominant with respect to resources to be distributed and if, for diverse reasons, there is a low degree of collaboration between scattered family members, TSP ties have to be interrupted, due to their unsustainability. Migrants are obliged to establish priorities within their TSP space, often having to restrict it to its previous configuration between two countries and to focus on closer family members for whom they have stronger moral responsibilities – specifically their children and parents.

Overall, the management of TSP across several countries is barely affordable for this type of family and, sometimes, this even involves a risky game, with both their present and their future blurred by uncertainties.

11.5.4 High Socio-Economic-Status Families: Thin Reciprocity and Autonomy

For privileged families, managing TSP across several countries is different. They may more freely decide to enlarge their TSP space in order to sustain or accumulate resources linked to social protection – either for a period or in a more durable way. In fact, Ramón decided to extend his TSP space in order to preserve or increase his key resources linked to income and housing. Migrants in this category better resist downward social mobility, because they have managed to accumulate capital to uphold their economic situation, despite having had to face two economic recessions. Their family members also have less need for support, which helps them to consolidate assets in both the origin and the receiving countries. They manage to cope better with the risks produced by the recession in Europe through their ownership of properties in Ecuador, the value

of which has increased while the job situation in Spain has worsened. This is reassuring for Ramón, who receives an income from his rented properties in Ecuador. Moreover, owning a property in the country of origin represents a security net for the future, as prospective state pensions might only cover part of one's living expenses. This is different for migrants of lower socio-economic status engaged in property construction back home. In fact, in the aftermath of the 2008 crisis, many have had to pursue their investment projects slowly or to suspend them due to other more urgent priorities (Palash and Serra Mingot 2019). Instead, migrants who have better access to an international supply of specific resources linked to social protection are less dependent on state provisions and have greater freedom to choose a particular standard of living in the countries concerned.

Their greater independence and autonomy can also be observed at the intra-familiar level. TSP ties have generally been rather thin over the lifecourse and mainly draw on organisational provision or reverse remittances from Ecuador to Europe. Migrants' involvement focuses mainly on occasional financial support for their elderly parents back home, motivated by filial moral obligation rather than by serious risk. Such is the case for Ramón, whose father in Ecuador is part of the privileged segment of the population who is entitled to a retirement pension. Accordingly, the circulation of support in these families is less diffuse, with fewer reciprocity ties and multi-directional resource flows than for underprivileged families. The greater autonomy of members of these more privileged transnational family networks also appears to imply less relational tension with respect to expectations and responsibilities of support. However, as experienced by Ramón, moving money from 'back home' is never a glorious act for migrants (Palash and Baby-Collin 2018).

Overall, their management of an enlarged TSP space implies fewer risks and constraints but, in the context of recurrent crises, remains more often adaptive than fully strategic. This seems to apply to Ramón, whose better economic situation enables him to manage his TSP between the two main countries (Spain and Ecuador), which prevents the dispersal of the social-welfare contributions he has made – which would have otherwise occurred had he moved to another country. In sum, unlike vulnerable families, privileged families can better manage their present and, at the same time, make plans for the future.

11.6 Conclusions

The results of this study contribute empirically, theoretically and conceptually to the literature on migration, transnational families and TSP in a number of ways. First, social protection arrangements in transnational families may encompass multiple countries, going beyond the conventional bipolar consideration of the dynamics involved between the country of origin and country of destination. Migrants' spatial trajectories often involve multiple migrations mainly motivated by income scarcities

linked to repeated economic crises, giving rise to more complex transnational ties and their organisation. Moving forward with the conceptualisation of resource environments by Levitt and her colleagues (Levitt et al. 2017), and considering space as '*socially produced' (*Massey 2005*)*, we conceptualise the TSP space, encompassing actors' practices to ensure social protection needs in specific environments and involving resources and constraints, as being subject to transformation over time. In contrast to studies which frame transnational families as extending their usual TSP space to take advantage of resources in other countries and accumulate assets, we show that the realities for families hit by recurring contextual destabilisation may be quite different. Rather than reflecting an opportunistic strategy, enlarging their TSP space actually represents a compensatory reactive adaptation to constraining environments. In fact, most of our informants who expanded their TSP space by migrating to the UK appear to have experienced progressive downward social mobility, involving the accumulation of vulnerabilities, risks and constraints. Secondly, integrating a circulation framework to the application of a socio-spatial approach o their TSP arrangements in transnational families and understanding the related logics and (im)mobilities, we identify a mechanism of diffuse circulation of support. Such a TSP system *from below* is extended in terms of the family members involved, not necessarily following a direct reciprocity logic, the timeframes over which such indirect reciprocity takes place and an enlarged TSP space encompassing multiple countries. Families dynamically adjust their resources and constraints through flexible socio-spatial adaptations, resulting in multi-directional financial, material and organisational provision in order to ensure intertwined areas of social protection. This implies the passing on of support responsibilities and the reversal of varied provisions as a form of social reproduction across space and time. This is shaped by external conditions linked to specific environments and internal family dynamics related to emerging needs along the lifecourse and the relational ties of the people involved. Such a coping flexibility mechanism is more adaptive than strategic, as it compensates for constraints and risks in their usual environment rather than implying an accumulation of resources.

Families manage their TSP space differently, according to their socio-economic status. In the greater majority of vulnerable families there is a thick reciprocity, a more complex synergy of multi-directional flows of resources between extended family members and their greater (inter-)dependence. However, this implies a delicate balance between scarce scattered resources and significant risks. This obliges family actors to prioritise certain social-protection areas and the family members in need or to suspend TSP ties if they become unfeasible, which may negatively affect their family relationships. In contrast, in the smaller group of more privileged families with a more secure situation, there tends to be a thinner reciprocity and greater autonomy both among family members and with respect to state provision. Last but not least, by addressing welfare concerns, this study has shown that migrants' social security rights linked to their old age are compromised across several countries, due to the fragmentation of the portability of their working contributions, leading to their immobilisation. Moreover, our findings demystify the assumptions of both the welfare-magnet hypothesis and welfare

tourism. More than being motivated by British welfare-state provisions, migrants' onward move to England is mainly related to better employment integration, as well as to the economic and real-estate crisis in Spain and the presence of migrants' own family networks. For these dual EU Spanish-Ecuadorian citizens facing austerity measures in Europe, family resources appear to be more crucial than welfare provision.

Although studies on TSP across several countries are complex, both in their realisation and in their analytical process, more evidence is needed, considering the current transnationalisation dynamics and recurring contextual destabilisation worldwide. In the post-crisis austerity era, even native EU citizens face more and more obstacles in accessing and maintaining circulating welfare entitlements across borders (Fernandes 2016; Lafleur and Mescoli 2018). When it comes to multiple receiving contexts and to subaltern citizens, going around in circles seems to imply even more risks, due to greater exclusions, marginality and uprooting. This may affect their territoriality ties and their claiming of social rights.

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Chapter 12
Beloved Land, Beloved Family: The Role of Welfare in Timorese Migration to England

Claire C. Millar

12.1 Introduction

Timor-Leste's long history of colonisation and occupation has posed significant welfare challenges for the Timorese people. When this small, half-island nation nestled between Asia and the Pacific achieved independence in 2002, it became the twenty-first-century's first new sovereign state. Since independence, the newly founded state, nascent market and prominent third sector have focused on consolidating security and stability, alleviating poverty and laying the foundations for nationhood. Alongside these state-building efforts a budding pattern of migration has emerged, with increasing numbers of Timorese migrating to the United Kingdom (UK). An estimated 16,000–19,000 Timorese now reside in the UK, although exact numbers are difficult to calculate as most travel using Portuguese passports and are considered Portuguese citizens by the sending and receiving states (Wigglesworth 2017). Although this burgeoning migration pattern has garnered little attention, it plays an increasingly important role in the welfare of Timorese families. This chapter seeks to understand how these migrants' welfare concerns shape their decisions about geographical mobility and *vice versa*.

Drawing on fieldwork conducted in Oxford and Peterborough in 2017, this chapter adopts Levitt et al.'s (2017) welfare resource environment conceptualisation to study how Timorese migrants and their families piece together social protection from varied and disparate transnational sources. Levitt et al.'s (2017) theorisation is modified slightly to ensure that the analysis of family-based security regimes remains culturally situated. Adding the work of Ng et al. (2003) acknowledges that any conceptualisation of welfare is culturally embedded, paying special attention to how the role of family can be understood and valued differently across cultures.

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This chapter explores the role of labour markets, states and family-based welfare provisions in Timorese migration to England. It first explores economic protections by examining unemployment in Timor-Leste, employment in the UK and labour-market conditions in both locations. The role of the state is then considered, tracking Timorese mobility across welfare regimes. State responsibility, distrust, dependency and education in Timor-Leste are contrasted with the new provisions offered to migrants by Britain's welfare state, including the social security, taxation, healthcare, legal and education systems. Arguing that Timorese migrants utilise the labour market's economic protections and state-based welfare in support of their own, family-based protection frames, this chapter elucidates the culturally differentiated ways in which migrants and their families piece together unique welfare solutions.

12.2 Theoretical Lens: Culturally Situated Welfare-Resource Environments

This book illuminates the need to understand social security as increasingly constructed beyond the nation state. To examine how welfare concerns shape Timorese migration to the UK, this chapter utilises Levitt et al.'s (2017) 'welfare resource environment' framework. This heuristic tool posits that individuals 'stitch together' social protection parcels, drawing on combinations of welfare provisions from all the possible protections available to them. Studying how migrants piece together social protection from many disparate and transnational sources quickly becomes complex. Access to welfare is strongly influenced by an individual's education, skills, resources, legal status, origin country, receiving country and social networks (Levitt et al. 2017, 11). An individual's resource environment is also not fixed and static but fluid and dynamic – it changes through migration, which itself is often a social protection tool. The welfare resource environment conceptualisation helps to capture this inherent complexity, providing a framework for mapping social protection in an increasingly transnational world. Levitt et al. (2017) identify four potential sources of social protection: states, markets, social networks and the third sector. This chapter expounds upon the first three of these categories, exploring the role of the state in sending and receiving countries, as well as family. The markets category is expanded to consider economic protections more broadly, discussing the role which employment and labour-market conditions play in migrants' welfare-resource environments. It does not investigate the third sector nor informal networks other than family in detail, as they are less prominent in the results. While they play meaningful roles in welfare provision in Timor-Leste, this chapter maintains a focus on the strategies that come to the fore through migration.

However, the welfare resource environment theorisation needs slight modification for the purposes of this chapter, to ensure that the analysis of family-centred informal security regimes is culturally situated. Levitt et al. (2017, p. 5) introduce

informal security regimes to 'fill out' the picture after consideration of state and market-based welfare provisions, describing them as especially common in developing countries where states may be weak or absent. This is certainly true to an extent in Timor-Leste, where 500 years of colonisation and violent occupation have created significant welfare challenges. The state and market fail to protect against social risk and the third sector can only reach so far. Yet family plays a key welfare role in Timor-Leste not only because the state and market fail to provide but also because it is a communal, collective society. This chapter suggests that informal security regimes do not dominate solely because other options are limited but because the cultural context places emphasis on interdependence.

Levitt et al. (2017, 11) also describe the 'relatively unreliable and ephemeral' nature of transnational sources that are not contractually guaranteed. They state:

> Whereas laws contractually obligate states to provide for citizens, and whereas market forces ensure that the most purchased protections will be provided, there is no such security for those who rely primarily on social ties and third sector organisations, each of which can withdraw their resources at any time and without recourse for the migrant.

This statement reveals an ethnocentrism that is in stark contrast to the findings presented in this chapter. For Timorese migrants – who reside as Portuguese citizens in a country continuously unsure if, when or how it will leave the European Union (EU) – state support in the current climate is unreliable. With precarious positions in the labour market as low-skilled, often casual workers, economic protections tied to the market may be seen as somewhat ephemeral. This chapter demonstrates that for Timorese migrants in the UK, family is paramount to security. To see state and market-based welfare as more steadfast than informal security regimes is arguably a Western viewpoint. It is therefore imperative to ensure that any examination of informal and family-based welfare remains culturally grounded.

Special attention must be paid to how the role of family in migrants' welfare-resource environments is viewed and valued differently across cultures. It is here that the work of Ng et al. (2003) becomes useful, in their explanation that any understanding of wellbeing is embedded within clusters of cultural assumptions and values. Often based on culture-specific moral visions, these define what is most meaningful in a given cultural setting. Most relevant to this empirical case is that members of individualistic and collectivist cultures differ in their conceptions of self-hood and emotional experiences of wellbeing (Ng et al. 2003). Individualism, a moral vision that emerged in Western history from Renaissance humanism, reigns in the West. The person is seen as the primary reality and society is relegated to a derivative, second-order level of reality that is simply a collection of individuals (Ng et al. 2003). Happiness is gained through self-determination: internal control and behaviour regulation are prioritised and individual autonomy is an important part of psychological wellbeing. In contrast, in communal cultures interdependence is fundamental. Society is the primary reality, with the individual a part of society. Relationships with others are paramount, as is the ability to fulfil the responsibilities associated with these relationships – happiness may be gained through meeting one's obligations to others (Ng et al. 2003).

With much research in this area conducted in Western contexts, the theories and measures developed have been understandably shaped by individualism. The welfare resource environment theorisation is no exception, leaning as it does towards a focus on the individual. There is a need to comprehend not only how individuals piece together transnational social protection parcels but also how this connects to welfare at the collective level. It is vital to both maintain awareness of the cultural values and assumptions underlying existing approaches and to understand how collective actors themselves conceptualise welfare. By utilising an extended version of the welfare resource environment framework, this chapter presents a nuanced understanding of the culturally differentiated ways in which migrants engage with labour market, state and family-based welfare provisions.

12.3 The Case: Timorese Migration to England

Timor-Leste's turbulent history has created significant welfare challenges. Portuguese colonisation lasted over 400 years and was marked by repression and the exploitation of human and natural resources, leaving behind little in material benefits for local people (Carroll-Bell 2015). Timor-Leste gained independence from Portugal in 1975, but after a mere 9 days, Indonesia invaded. During the following 25 years of violent occupation it is estimated that a third of the Timorese population died. An independence referendum in 1999 led to the Democratic Republic of Timor-Leste officially coming into being on 20 May 2002. Despite significant resource investment since independence, Timor-Leste's population of 1.3 million still suffers some of the worst welfare indicators in the world. Timor-Leste's life expectancy at birth (69 years) is still among the worst in the region, as are the mortality ratios for mothers, infants and children under five (Carroll-Bell 2015; World Bank 2018). Around 40 per cent of the population is estimated to be living in absolute poverty, with 73 per cent living on less than two US dollars a day (Department of Foreign Affairs and Trade 2014).

Little information is available on migration trends and patterns in Timor-Leste, including limited quantitative data and scarce academic research (Almeida 2010). Yet migration is not a new phenomenon there and encompasses significant internal and international migration (Guterres 2007). The first major international emigration occurred during Indonesian occupation, with approximately 250,000 people fleeing to West Timor (Indonesia), Australia and Portugal – many staying on to build new lives. Since independence, economic reasons have replaced conflict as the main motive for international emigration. Most occurs intra-regionally, with major destination countries being Indonesia, Australia, the Philippines and Portugal (Almeida 2010). Some pathways are promoted and sponsored through bilateral government agreements, including temporary labour-migration programmes in South Korea and Australia.

Alongside formal schemes, another pattern has emerged in significant numbers of Timorese working in Europe. Because citizens of former Portuguese colonies are

entitled to Portuguese citizenship if they were born during the period of Portuguese rule – and Portugal never recognised Indonesian sovereignty over Timor-Leste – a unique loophole exists that makes Timorese born before 20 May 2002 eligible for Portuguese citizenship. Some Timorese have taken up this opportunity, applying for Portuguese passports for the purposes of labour migration. The story then goes that in the late 1990s, a factory in Northern Ireland was seeking labour through existing migration routes from rural Portugal. A Timorese took up the offer and went to Dungannon. He told his friends, they told theirs, and a steady stream of Timorese looking for the mythical chicken factory have been arriving ever since (Peake 2014). Migration has subsequently expanded to urban centres across the UK, where an estimated 16,000–19,000 Timorese now reside (Wigglesworth 2017). Regarding the fieldwork locations for this research, the Timorese connection with Oxford began when asylum-seekers settled in the area during Indonesian occupation – an estimated 2000 Timorese now live there (McWilliam 2015). In Peterborough, the first two Timorese migrants arrived in 2002 and approximately 500 people are now registered with the Peterborough Timorese Community Organisation.

Despite drawing little attention, this trend is worth taking seriously. The value of inward remittances makes labour Timor-Leste's largest export after oil, having overtaken coffee. An estimated 43 million US dollars were remitted to Timor-Leste in 2017, with 63 per cent coming from the UK (Curtain 2018). As these data do not include cash remittances or transfers using the recently popular Moneygram, the figure is likely higher. Furthermore, increasing development is usually accompanied by increasing migration, as social and economic development amplifies people's aspirations and capabilities to migrate (de Haas 2005). This is evident in both the emigration evolving alongside Timor-Leste's post-independence development and the migration patterns of neighbours in South-East Asia and the Pacific. In Shuaib's (2007) remittance study 85 per cent of respondents stated they did not know when their overseas remitters would return, suggesting that emigration could become permanent. Overall it is likely that the importance of migration as a welfare strategy for the Timorese will only grow.

12.4 Data and Methods

This chapter analyses 16 semi-structured interviews completed in Oxford and Peterborough in 2017, conducted in the Tetun language.[1] I am a fluent Tetun speaker due to my past experience living and working in Timor-Leste. Interviewees were recruited using snowball sampling, making contacts in England through existing networks in Timor-Leste and social media. As personal relationships were instrumental in gaining access, informed-consent forms in Tetun were used to formalise

[1] Tetun is the *lingua franca* and national language of Timor-Leste. Timor-Leste's constitution classifies Tetun and Portuguese as official languages, English and Indonesian as working languages and 18 local languages as national languages (Democratic Republic of Timor-Leste 2010).

the process and emphasise the role of the researcher and care was taken to manage the potential impact on relationships if respondents were unhappy with the process.

Overt participant observation was also undertaken, resulting in over 50 hours of informal conversations and extensive field notes. This included participation in community activities such as social night and football training, spending time with migrants in their homes and sharing meals together. As many more migrants wanted to be interviewed than was feasible, time was spent listening to those whom it was not possible to formally interview, allowing them to share their experiences. The field was further expanded by conversations with migrants in London, Manchester, Great Yarmouth, Bridgwater and Northern Ireland and by discussing interviewees' prior internal migration during their interviews. Although fieldwork was conducted in England only, interviews covered respondents' pre-migration life in Timor-Leste and the impact of their migration on those remaining in Timor-Leste – the results reflect this. Interviews were transcribed in Tetun and interview data and field notes coded using Atlas.ti software. Aligning with an emphasis on migrant perspectives, data analysis used an exploratory, bottom-up inductive approach. All interviewee names used herein are pseudonyms. The background characteristics of the interviewee cohort are summarised in Table 12.1.

12.5 The Role of Labour Markets in Welfare Provision

Welfare concerns pertaining to economic protection, employment and labour-market conditions were the most prominent drivers in Timorese migration to the UK. In their discussion of welfare, Levitt et al. (2017) give examples of provisions such as private health insurance, contracted childcare, property investment and the protection of workers' rights. Here the net is cast much wider, moving away from traditional definitions of market-based welfare to consider the role labour-market concerns more broadly play in Timorese migrants' welfare-resource environments in England. Interviewees had vastly different experiences with labour markets before and after migration. Unemployment in Timor-Leste and Portugal, employment and a well-developed private sector in the UK and labour-market conditions across all locations profoundly shaped mobility, as migrants attempted to piece together economic security.

12.5.1 (Un)employment and Labour-Market Conditions in Timor-Leste

Unemployment and labour-market conditions in Timor-Leste were central forces in this migration phenomenon. Interviewees raised unemployment as a major issue in Timor-Leste, many claiming it is the main reason people are choosing to leave

Table 12.1 Interviewee background characteristics

Characteristic	Category	No.
Sex	Men	10
	Women	6
Age in years	20–34	10
	35–49	5
	50–69	1
Time in UK in years	<1–4	8
	5–9	4
	10–15	4
Citizenship used in UK	Portuguese *(since gained British citizenship)*	16 *(1)*
Highest level of education	Senior high school *(started university)*	14 *(4)*
	Junior high school	1
	Primary school	1
Current residence	Oxford	6
	Peterborough	10
Previous locations of residence in Europe	Migrated via Portugal only	2
	Migrated via Portugal and internally within the UK	2
	Migrated internally within the UK	4
	No internal European migration	8
Children and their location	Has child/ren (in the UK)	7
	Has child/ren (in Timor-Leste)	2
	No children	7
Current employment in UK	Produce or supermarket packing factory	6
	Warehouse (online shopping and delivery)	4
	Automotive manufacturing	2
	Hospitality	2
	Not working (retired; extended maternity leave)	2
Previous employment in Timor-Leste	Development sector*	8
	Clandestine independence movement (advocacy)	1
		2
	Labourer	2
	Hospitality	1
	Retail	1
	Security (government)	1
	No previous employment	

Note: *The development sector includes interviewees with combinations of experience in the public sector, local non-government organisations (NGOs), international NGOs, United Nations (UN) bodies, research and religious organisations

their *rai doben* or 'beloved land'. However, as most of the migrants interviewed had worked in Timor-Leste prior to migrating, unemployment tended to be discussed by interviewees – such as 66-year-old Joana – as a general migration determinant:

> Why are so many people from Timor-Leste leaving and coming to England? Because there's no work. So many people don't have work. That's why people are leaving in numbers you can't joke about.

Many asserted that education does not lead to employment in Timor-Leste. They described how they had observed young Timorese graduating from university with post-graduate or Indonesian degrees, only to be unable to find work. Indeed not one of the 16 interviewees had completed university, yet all but one (who migrated immediately after high school) had worked in Timor-Leste. Six had been non-professionals, with women in service-industry jobs and men in construction or security. The remaining nine all had professional work in the development sector, in areas as diverse as child protection, emergency response, internal displacement, infrastructure rehabilitation, rural development, literacy, economic empowerment, disability, public health and violence prevention. Most had worked in both the public and the third sector, demonstrating that tertiary qualifications are not required for employment in government, international NGOs or UN agencies. It should be noted that the work experience of interviewees is not representative of Timor-Leste's population, indicating that migration may be selective.[2] That unemployment was so often raised as a migration determinant by migrants who had themselves been employed (including immediately prior to migration) also suggests that the decision to migrate might have occurred at a family or collective level.

Even with employment, labour-market conditions in Timor-Leste were pertinent. Salaries were low across all sectors and work in the development sector in particular was often contract-based. Many described their salaries as insufficient to cover their living costs or basic household needs. A monthly government salary of US$ 200 might cover food and transport but making it last the whole month is difficult, given the expense of many children, large extended families and cultural practices of giving. One interviewee described working in a government ministry where salaries were not only low but often 3 or 4 months late. For those with families engaged in agricultural work, money was even scarcer. One man described how coffee farmers could work intensively for months, only to receive 25 US cents per kilo of coffee. A family who sells a lot might receive 200 or 300 US dollars but, as the year's only income, 'All you can buy is rice'. Work and the chance to earn a decent salary were simply the greatest factors in the decision to migrate. One interviewee joked about his friends in the LGBTQ+ community in Timor-Leste who assumed that he migrated due to family and societal pressure over his sexuality; laughing, he explained that, in reality, he was just looking for money. As another so succinctly put it, 'Money is the reason we want to live here'.

The four earliest migrants, who have now been in the UK for between 12 and 15 years, had migrated via Portugal. They initially migrated for both political and economic reasons and reported being required to travel to Portugal to apply for Portuguese citizenship. Although familiarity with the former coloniser and networks of extended family and friends connected them to Portugal, language was not a factor determining migration. The Portuguese language skills of these four

[2] Those engaged in subsistence farming and fishing (27 per cent of Timorese aged 15–64) and those who are unemployed, not seeking work or in unpaid or informal work (42 per cent of those aged 15–64) are not represented in the interviewee cohort (La'o Hamutuk 2015).

interviewees ranged from fluency to no Portuguese at all.[3] They stayed in Portugal for between 5 months and 4 years, before being recruited for factory work in England. They described learning via word of mouth about employment agencies that organised factory work in the UK, providing accommodation and airport pick-ups and lending cash to be repaid once the migrant started work. All four named unemployment and labour-market conditions in Portugal as determinants for their onward migration to the UK. Portugal's high unemployment rates, low salaries and the kind of work available (such as cleaning) were mentioned. One man concluded that 'There are more and better opportunities in England than Portugal' and that Portugal is 'also not a well-developed country'. Thirty-five-year-old Maria said:

> In Portugal there is no work. The land is in crisis, there is no work. Friends say 'Ahh, go already to England. In England there is work'.

12.5.2 Employment and Labour-Market Conditions in England

In England, half of the 16 interviewees were working in factories – either in produce or supermarket packing factories in Peterborough or in automotive manufacturing in Oxford. Another four worked in warehouses and delivery for online shopping and logistics companies, one at a café, one in hospital catering, one had not returned to work after maternity leave and one was retired from factory work. Other work (either interviewees' past jobs or the work of Timorese migrants not formally interviewed) included meatpacking, hospitality, hotel and supermarket work. Migrants often mentioned whether they worked through employment agencies or as permanent contract staff. Agency work was considered less desirable, as 'flexible' schedules meant shorter shifts, no guarantee of full-time hours and smaller pay packets. Many started with agencies before moving to contracts. This was employer-dependent: for example, several Peterborough interviewees had successfully moved to 'permanent contracts' with a local produce packing factory, whereas those in automotive manufacturing in Oxford remained with agencies for many years. English-language skills varied, with fluency rare among interviewees. Like initial migration via Portugal, language did not appear to be promoting migration to the UK. However interviewees were aware of its importance in the labour market, noting that many Timorese were unable to ascend workplace hierarchies due to their insufficient English.

Interviewees were generally positive about labour-market conditions in England. Parents were pleased that they could work nights or weekends, so that they could look after their children or rotate childcare with their partner. Interviewees enjoyed

[3] Portuguese is mainly spoken by older and highly educated Timorese. Those educated during Indonesian occupation speak Indonesian alongside Tetun and local languages, while younger generations favour learning English as an additional language (East Timor Government 2012).

working alongside other immigrants in multicultural workplaces, describing how people came from all over the world to the UK, where work was available to those who wanted it. This overall positivity did not mean that migrants were willing to accept just any conditions. Some moved jobs (or changed shifts) for a pay-rise or 'lighter' work, to gain new skills or due to dissatisfaction – such as discomfort with cash-in-hand restaurant work and the future problems which employer tax avoidance could bring. Many worked long shifts, typically between 8 and 12 hours. They admitted that it could be tiring and boring or, as one factory worker said, 'When the line spins, my head also spins'. Yet interviewees overwhelmingly iterated that it was worth it for the money, with difficulties disappearing once paycheck hit bank account. Wages in England were described as those with which one could transform one's life. England's comparatively abundant labour market enriched migrants' welfare-resource environments, offering new economic protections and a better quality of life, as Alitu, a 32-year-old man, confirmed:

> Compare England with Timor. Because here, you have work. That's it. Therefore, you have money. You have money, you have life. If you don't have money, what are you going to do? That's all it is.

One new and novel element of migrants' welfare-resource environments in the UK was a well-developed private sector, which interviewees repeatedly noted they had not been exposed to in Timor-Leste. Only four had worked in the private sector before migration: three in small businesses and one labouring with a road-construction contractor. Since migrating, all 16 had worked solely in the private sector. Interviewees also observed the existence of Portuguese restaurants, Lithuanian supermarkets and halal butchers in their neighbourhoods, noting that the Timorese seemed to be the only immigrant community without businesses. This exposure certainly exerted influence, with the potential to shape future mobility. Around half of the interviewees discussed the idea of starting a business in Timor-Leste, with most imagining small businesses such as a corner kiosk or building a rental property. One woman described her dream of creating her own business and providing employment for others. While working at a produce packing factory, she studied how it ran, researching how the company was built in her spare time. These experiences were connected back to work, with a well-developed private sector seen as a source from which the key protection mechanism of employment could be derived.

12.6 State-Based Welfare Provision

State-based welfare provisions, or lack thereof, were also shaping Timorese mobility to England. States provide social protection through numerous institutions, operating at multiple levels of government, from supranational to subnational (Levitt et al. 2017). In this section an exploration of state responsibility, distrust, dependency and education in Timor-Leste is contrasted against migrants' experiences

with social security, public services, taxation, healthcare, legal protection and education in England.

However, it is important to first note the vital role that citizenship and the supranational EU play in this case. As all interviewees arrived in the UK on Portuguese passports, access to social protection is clearly tied to citizenship and residency status. Portuguese citizenship offers a path to the EU and England and is integral to the multi-state protection parcels that Timorese migrants piece together. For 66-year-old Joana, who had migrated via Portugal, this was clear:

> Portuguese government opened the path for us to come… work in England. Portuguese government is the one that gave it to us. Portuguese government opened the door for us from Timor to come to Portugal, make our passports, make our identification cards.

Because Timorese migrants are considered Portuguese citizens by the sending and receiving states, there are no official statistics pertaining to Timorese living in the UK and little bilateral institutionalised support for migrants. Furthermore, with Brexit looming, the future of this trend is uncertain. At the time of this research, Timorese communities had appeared in the Republic of Ireland in response to the Brexit referendum and may materialise elsewhere in the EU should this pathway be restricted. According to more recent anecdotal reports from networks in Timor-Leste, the queues outside Dili's Portuguese embassy – fondly known as the 'passport shop' – continue to remain long.

12.6.1 State Responsibility, Distrust, Dependency and Education in Timor-Leste

Interviewees described the state in Timor-Leste as a central presence in their welfare-resource environments, with overwhelming responsibility for looking after its people. Providing for vulnerable groups like the unemployed, the elderly, the disabled and the poorest of the poor was seen as a priority for the state, alongside a perceived responsibility to provide employment. Some migrants felt that these protections have not materialised and the alleged failure of the Timorese state to look after its population was a recurrent theme in interviews. One woman said that the state 'doesn't give work to people, doesn't look after people', while a young man claimed that the state does not want to 'open up work' for school leavers because it is disinterested – that it instead 'just closes its eyes to these things'. Interviewees spoke of sluggish development since independence, acknowledging that the poverty, unemployment and violence of 15 years ago still exist today. Development activities funded by overseas governments, which are conspicuous in Timor-Leste, are also a form of multi-state, transnational social protection. Some interviewees thought that the Timorese government was uninterested in or incapable of adequately providing for people without assistance from international organisations. Sabino, a 33-year-old man, stated:

> I don't really accept like, handing back to government… because if you hand it over to Timor, development will fall. Everything will go really bad.

These discussions elicited a sense of distrust of the state in Timor-Leste. Poor public administration and high government expenditure were lamented, with examples like constant overseas 'study trips' by Timorese leaders to learn about systems implemented elsewhere providing no benefit. One man described a 2016 government forum on disability rights being held in venues inaccessible to people with disabilities, exemplifying the government's perceived tendency towards talk without action. Corruption was cited as a barrier to the state's implementation of adequate welfare protection – a barrier so large that interviewees were unable to fully conceptualise how the state might develop social-security mechanisms or public services without dealing with it first. Nepotism was considered to be a particularly pervasive subset of corruption. Many described finding employment without family connections as difficult, particularly in government offices. One interviewee recognised that reducing nepotism is challenging given Timor-Leste's small population, large families and cultural norms around helping 'your people'. Interviewees bemoaned the fact that if political leaders are corrupt then the people also do as they wish, with an 'If he can do it, so can I' mentality. Nepotism and cronyism reportedly restricted access to state-provided education and healthcare. Examples included student places at the national university being based on whether the applicant had family working there, or as 22-year-old Marco described, entry to Dili's national hospital:

> Every time in Timor you go to like the hospital… there is always security there. Perhaps sometimes you go they don't let you in, you don't get in. Then their family come, and they open up straight away.

Migrants' welfare concerns not only shaped their mobility – migration in turn shifted perspectives on the role of state-based welfare in Timor-Leste. Some interviewees raised dependency as an issue, claiming that their viewpoints had changed since migrating. One woman thought that the majority of Timorese are now overdependent on the state and third sector, simply waiting for the government to provide employment. She described how she and other migrants were now thinking that taking responsibility for improving welfare themselves might be more effective than waiting for the state. Migration and remittances were seen as one way they had taken development (at least at the household level) into their own hands.

Education featured prominently in Timorese migrants' decisions about mobility. Pre-migration, most interviewees had completed senior high school, except for two women whose education had ended at primary and junior high school. None had completed university, although four had started. Almost half of the interviewees (both sexes, all ages) raised financial obstacles when discussing why their education ended, with many expressing sadness that their families could not afford their education's continuance. Factors like the death of a parent or having numerous siblings often exacerbated economic barriers. War and conflict had prohibited those in their 30s and 40s from continuing their education, while younger interviewees discussed starting university but losing interest upon seeing graduates unable to find work.

Others claimed that they made the decision on their parent's behalf, not wanting family to take on debt when there were already many mouths to feed. As education is not currently a prerequisite for employment in Timor-Leste, but employment is vital for the provision of basic needs, some interviewees relinquished further education to prioritise the basic welfare of themselves and their families. This was sometimes mirrored in the decision to migrate. A number of interviewees were first-born children or had many younger siblings and chose to forego further education and migrate so that their siblings could continue schooling. Twenty-two-year-old Marco explained his decision:

> I looked based on economy, in the household, maybe if like I'm the only one, ok I can go to school. But there are also my siblings, so I made the decision and said to my mother 'Leave it, I'll look for work'. … If I was alone in the household I could make the decision for my parents to go into debt so I can go to school, but we're so many in our household. So I made this decision to come here to work, to look after my siblings… for me to go to school, I can't make my parents suffer more.

12.6.2 Welfare Systems in England: Social Security, Taxation, Healthcare, Law and Education

As in Timor-Leste, migrants saw the state in the UK as responsible for looking after its people. Interviewees were impressed that the state could provide welfare protections to its large population. One claimed that the government does not leave people 'suffering in darkness' as in Timor-Leste – in England, 'the poor are not *too* poor'. The perceived responsibility of the state to provide employment surfaced again, with importance placed on the idea that the state 'gave people work to do everyday'.

Interviewees depicted positive experiences with Britain's social-security system. Parents described receiving child benefits, often seen as their taxes being paid back to them. Sixty-six-year-old pensioner Joana described the support she receives:

> Now I receive retirement money. The government gives me money. I receive. The government gives me a house to live in. The government gives me everything ah, free. I don't pay for anything. I don't pay for the house, don't pay for electricity, don't pay for water, don't pay to go to the doctor, don't pay to get glasses, don't pay to get the bus, everything for me, free.

A single parent recounted his experiences with the welfare system during his fight for sole custody of his daughter, the victim of domestic violence perpetrated by her mother. He described how the mother's name was replaced with 'Government of the UK' on his daughter's birth certificate, his municipal public housing and how his daughter cannot leave the UK without a social worker before the age of 18. He saw this experience as overwhelmingly positive, as did others who described the provision of public housing, money or assistance if someone is sick or unemployed as a government looking after its people. One interviewee described home visits by child services as the government kindly checking to see if a family is OK. Migrants praised good governance and professional, uncorrupted bureaucracy. The list of

lauded public services was long: parks and gardens, libraries, sports fields, accessible paths and jobs for vulnerable people. Local government provided interpreters for Portuguese-speakers and funding for Peterborough's Timorese Community Organisation.

Migrants recognised that the UK's taxation system was what allowed for many of these public services. They explained the insurance number system, how tax was taken out of pay, how everyone (not only the big companies) pays tax and how local governments cover the cost of services like rubbish collection by collecting rates. Workers thought that Timor-Leste could use a proper taxation system, recognising the mutual benefits for both the state and the population, such as quality state-funded healthcare. Thirty-three-year-old Sabino said:

> About health, health is important. Because the hospital, like here… you work, you pay tax, you go to the doctor, everything is free. Because you've already paid tax, from your pay, your salary. In Timor, you work, there's no tax, you'll have to pay for medicine, you'll pay for everything.

Women described their positive maternal and child healthcare experiences in England, while others utilised access to state-provided healthcare for family members. One interviewee flew her mother to England for GP treatment, indicating the limitations of Timor-Leste's basic medical care.

Interviewees were also in awe of the UK's legal system. They admitted having no idea about the kinds of laws existing in England pre-migration and that the learning curve had been steep to varying degrees. Interviewees recounted both minor instances of learning to abide by the law first-hand (such as being pulled over for driving without a licence, going to court and paying a fine) and more serious incidences resulting in Timorese men serving prison sentences. The effective implementation of and respect for legal protection was particularly important. Interviewees said that although Timor-Leste has a legal system, it is not strong. They described their amazement upon realising that England's legal system is effective, the general population respects the law and that they could walk around freely. As one woman put it, 'In Timor, people aren't really scared of the police. But here people are scared of the police like they are of God'. While perhaps not traditionally identified as components of welfare, Timorese migrants were adamant that safety, stability, peace and security are protections underpinning all others. The ability to live a life free of fear and violence is vital for wellbeing in any other form.

Education was also a key facet of migrants' welfare-resource environments in England. Conversations included educational opportunities for migrants themselves (like training courses) but focused on the education of children. England's education system loomed large in the minds of the nine interviewees who were parents, as being educated in England was seen as a way to avoid a life of suffering and increase future opportunities. One couple migrated while pregnant so that the child could be born, raised and educated in England. Education was also shaping future decisions: for those with children in England, wanting their child to be educated in the UK was the single greatest factor in their plans for the future. However, parents were monitoring Timor-Leste's education system, expressing that they would prefer to be in

Timor-Leste if the quality of education there increased. Citing inadequate facilities, the distance to schools in rural areas, the problematic issue of curricula being in Portuguese rather than Tetun and the frequent use of corporal punishment, they noted that this is unlikely to occur in the near future.

12.7 Family-Based Welfare Provision

Family, friends, neighbours, co-workers and others all constitute networks of social ties that offer welfare protections outside the state, market or third sector (Levitt et al. 2017). Often the very *raison d'être* for labour migration around the globe, family in particular shapes individual aspirations for and actual practices of mobility. Through migration, transnational actors provide for non-mobile individuals and *vice versa*. Family is part of a migrant's resource environment, for example by caring for children remaining at home. The migrant's transfers of remittances, knowledge and connections are simultaneously fundamental to the family. Even for those who have never left their home village, welfare provision is increasingly transnational.

This final section first explores the role of family in Timorese migration to England, demonstrating how migrants utilise increased access to labour-market and state-based protections in service of their own, family-based welfare regime. The results are then connected back to the central theoretical notions, in a discussion that aligns the focus on family with interdependence in communal cultures and contrasts it against migrants' experiences with independence. It is concluded that the economic and state-based protections offered to Timorese migrants through mobility are valued for their contribution to a framework founded on relationships and responsibility.

12.7.1 The Role of Family: Migration Determinants, Remittances and Return

Family plays an integral role in this case. Family-based welfare systems reign supreme in Timor-Leste, with extended families providing housing, childcare (including informal adoption), cash, employment, healthcare, education, labour and capital to one another. Twenty-two-year-old man Alex described this safety net:

> Like in Timor-Leste you would never become homeless, because family will always help, look after you. Even if you don't have any money, you don't have a house, but your family has a house. You go and sleep there. Eat there, eat for free, drink for free.

Family's prominence translated into the decision to migrate, with supporting immediate and extended family undeniably at the forefront. Siku, a 28-year-old man, and Estela, a 45-year-old woman, stated respectively:

> Yeah this decision [to migrate], sometimes to look after your family… you know the Timorese system. You can be grown up but you still need to look after your mother and father.
>
> To more or less sustain my nieces and nephews, that's my dream.

Interviewees often said that family was their first priority, with remittances a clear example of this. Remittances were most often sent to parents and siblings but also to nieces, nephews, children and spouses. The frequency and amount varied, with newer, younger arrivals sending up to GBP 800 every month. Others remitted once every 3 or 4 months, while those who had been in the UK longer (often with their own children in England) sent GBP 100 twice a year or only when families in Timor-Leste had a specific need. The most frequently mentioned uses of remittances were food and siblings' education (including tuition fees, transport and living costs for those studying in Dili or Indonesia) followed by the education of nieces and nephews. Some families purchased protections from the market in Timor-Leste by building or fixing up houses to live in or by building a small rental property in order to secure an income stream.

The impact of remittances was also discussed in terms of family – indeed it was often hard to move away from the topic! When asked about migration's economic impact on themselves as individuals, interviewees spoke of the house they had built (which their family lives in) or their feelings of satisfaction (gained from paying for their siblings' education). Many reported improvement in their families' welfare, although the impact ranged from 'really big' to seeing remittances as 'just vegetable money' allowing improvement 'little by little'. Some noted that meeting their savings goals in England was difficult, due to family needs in Timor-Leste and the *lia* tradition, which obliges people to give money and resources at death, marriage and other cultural rituals. Wages and benefits accessed via the labour market and the state in the UK, when remitted home, thus form a key part of the transnational protection parcels which migrants and their families piece together.

Reflections regarding return migration also centred on family. Although no interviewees spoke of having clear plans for the future, rumination revolved around family considerations. For those with some desire to return to Timor-Leste, it was usually to be with family. A good life in Timor-Leste was described as living with family in a safe, peaceful environment, with the ability to provide for them. Connection to place, culture, food, weather, belonging and a desire to contribute to development also featured. Interviewees frequently mentioned how much they missed their family and how intensely sad or anxious not being physically close made both migrants and those at home. Migrants often wondered aloud how they could have left parents, partners, siblings and children. As one interviewee explained, 'You know how it is in Timor… when we're apart from each other, we always miss each other'.

Those who discussed staying in the UK raised the same motivation – family. As noted previously, it is here that children become an important factor, with parents seeking future protection against social risk for their children by prioritising quality education. Interviewees with children in the UK sometimes expressed a personal desire to return to Timor-Leste but insisted that their child/ren should be educated in

the UK first. When asked about her desires for the future one mother declared 'My children will finish school. Then I'll go to Timor'. José, a 45-year-old man, similarly said:

> I think a lot about going to Timor. I want to go to Timor… but first I will develop my family. When my family, my children all have success, are all in university… I can begin to give it a try in Timor.

Although interviewees discussed return migration, existing evidence suggests that they are more likely to stay, particularly once they have children in the receiving country. As Castles (2004) describes, the primary labour migrant is usually a young person intending to return once savings targets are reached – this is evident in younger, more-recent Timorese arrivals who discussed staying overseas for 3–4 years but who ultimately want to return home. Castles (2004) explains that difficulty in achieving savings targets may lead to a prolonged stay, in turn encouraging family reunion or formation. Here we see Timorese migrants who have been in the UK for 5–10 years and have formed families in England or brought children over from Timor-Leste. Although parents in this cohort anticipated return to Timor-Leste, 'Once migrants' children go to school in the new country, learn the language, join peer groups and develop bicultural or transcultural identities, it becomes very difficult for the parents to leave' (Castles 2004, 209).

In earlier sections it was suggested that decisions may be occurring at a family level, as interviewees were frequently professionals hailing from a context with high unemployment and/or had younger siblings for whom they purported to have foregone further education and migrated. Even if not technically household decisions, family is clearly central to the choices made by individuals. This is seen in the decision to migrate to support family, or to remain overseas until savings goals are met or siblings in Timor-Leste have finished school or university. It is clear that Timorese intergenerational care arrangements, in combination with the welfare provisions offered through migration, are influencing both present and future mobility. The results also showed a mother flown to the UK from Timor-Leste to visit a doctor, a child deliberately born in England in order to access quality healthcare and education, parents delaying or relinquishing return migration so that their child/ren could be educated in the UK and remittances providing protections for extended networks of relatives in England and Timor-Leste. All exemplify how Timorese migrants in England utilise migration – and the protections it brings – to support their own, family-based welfare systems.

12.7.2 Interdependence and Independence in Culturally Embedded Welfare Provision

The central role which family plays in Timorese migrants' welfare-resource environments aligns with the emphasis on interdependence in communal, collectivist cultures. Interdependence does not mean that people lack concern about their own

personal value or that all relationships are focused upon equally (Ng et al. 2003). The 'demands' of others do not necessarily impinge on self-need – rather, participation in social relations creates fulfilment. In communal societies people indirectly pursue the happiness of their loved ones, and meeting one's obligations in turn brings happiness (Ng et al. 2003). This is clear in Timorese migrants' decisions about mobility, the importance of their ability to provide for family and their satisfaction when this is possible. The intensity of homesickness experienced also aligns with the sensitivity of individuals in collective cultures to their relationships. Even the discussions surrounding the difficulty of reducing nepotism in Timor-Leste reference the very cultural norms that underpin informal and family-based protection regimes. The individual is inherently connected to others, making kinship, social obligations and belonging fundamental (Carroll-Bell 2015).

Living in England migrants were immersed in a Western context: here distinguishing between interdependence and independence is a useful heuristic. While in communal societies the cultural imperative is to be an interdependent self, in the West it is to be an independent self (Ng et al. 2003). Independence does not equal selfishness or lack of sociality but is, instead, a complex set of relationships, institutions and social practices providing people with choices, thereby creating opportunities for happiness through self-determination (Ng et al. 2003). Interviewees discussed their experiences with financial self-sufficiency, learning to manage their own time, independent decision-making and travel. Earning, managing and living off one's own money was a novelty, with paying rent and budgeting to buy smart phones, clothes and cars being new experiences for most. They experienced immense improvements in the quality of housing and food – one interviewee was delighted that his body had become paler and fatter since migration because he now worked inside and ate meat. Travel was also a benefit of self-governance and taking holidays for reasons other than cultural events, funerals and family responsibilities was a new experience for some interviewees. The increased feelings of independence which Timorese migrants experienced is unsurprising, given that self-determination, autonomy, internal control and regulation of behaviour are important in the Western conceptualisation of selfhood (Ng et al. 2003).

While migration altered Timorese migrants' access to the economic protections of the labour market and state-based welfare, the focus nonetheless remained on family and interdependence. Most interviewees noted the benefits of individualism but said that they just did not subscribe to it themselves. Some described individualism in European society as negative, while others were clear that it was part of life in the UK but not desirable for Timor-Leste. State-based protections and employment were valued most for what they provide the family. England's healthcare and education were valued not only for their benefit to the individual migrant but also for how they serve immediate and extended families. The availability of work, a highly lauded facet of migrants' welfare-resource environments in England, was valued because it increased a person's capacity to provide for family. Employment was valued because it facilitated household-level development and strengthened family life, overriding any gains in individual financial independence and self-governance. While younger interviewees were more likely to mention their

newfound ability to buy consumer items or to travel, they also remitted larger percentages of their salaries. Despite living for up to 15 years in a context where the cultural imperative is independence and self-determination, interviewees gained individual wellbeing by pursuing the welfare of their loved ones.

12.8 In Conclusion

This chapter has shown how welfare concerns shape Timorese mobility to England and *vice versa*, with migration itself being a welfare strategy. In Timor-Leste, resource environments exhibited a scarcity in market and state-based provisions, with immediate and extended family playing an integral role in insuring against social risk. Unemployment, labour-market conditions and limited state protection influenced decisions about mobility for migrants as both individual and collective actors. Migration to the UK – facilitated by access to Portuguese citizenship and the EU – brought employment opportunities, improved labour-market conditions, a safe environment and the accoutrements of the British welfare state in social security, healthcare and quality education.

However, interviewees were adamant that more than the provisions offered by an employer or the state, the greatest opportunity migration provided was the capacity to improve life for themselves and their family. Although some sections focused on state responsibility, this indicates that migrants do not necessarily seek full state provision. Rather, they seek a baseline level of economic and social security, perceiving the state's role as protecting fair conditions, providing equal rights and enabling people to enjoy and build upon fundamental welfare protections. The changes to welfare-resource environments that migration facilitated altered the social protection parcels that Timorese migrants could piece together, empowering them with the capability to transform themselves and their families.

Understanding how migrants and their families give life meaning is vital to the study of global social protection. By using an extended version of Levitt et al.'s (2017) welfare resource environment framework and querying the perspectives of migrants from communal Timor-Leste living in a Western context, this chapter sought to demonstrate that how people conceptualise welfare is culturally situated. It was found that Timorese migrants in England utilise migration – and the economic and state-based protections it brings – in service of their own, family-based systems. Mobility between welfare contexts allowed access to new sources of welfare, enabling migrants to fulfil their responsibilities to family and in turn ensure their own wellbeing. Timorese migrants valued increased access to the labour market's economic protections and state-based welfare for the ways they supported a family-based framework founded on interdependence, relationships with others and responsibility. By querying the geographical mobility of Timorese migrants in England in light of their welfare concerns, this chapter has illuminated the contextual and culturally embedded ways in which migrants engage with the protections offered by labour markets, the state and family.

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Chapter 13
Securing Old-Age Pensions Across Borders: Sudanese Transnational Families Across the Netherlands, the UK and Sudan

Ester Serra Mingot

13.1 Introduction

In recent years, the media, public opinion and political discourses have fed the idea that intra-European migrants are increasingly relying on the welfare states of their host EU country (Giulietti and Wahba 2012). Whereas some studies claim that the more-generous welfare states act as a migrant magnet (Borjas 1999; Enchautegui 1997), others do not find such clear-cut relation (Levine and Zimmerman 1999; Talleraas 2019). Yet, the so-called 'welfare migration' (Giulietti and Wahba 2012) – or the likelihood of migrants moving to countries with more-generous welfare systems – has become a topic of political and public concern and has influenced important European political processes such as Brexit (Blauberger and Schmidt 2017).

Recently, a few qualitative studies have pointed to the 'onward movements' of some new migrant groups of refugee background – e.g. Somalis and Iranians – from countries with some of the most 'generous' welfare states such as the Netherlands, to the UK, where social welfare is less generous[1] (Ahrens et al. 2016; Bang-Nielsen 2004; Haandrikman and Hassanen 2014). Many of these 'onward movers' first arrived in Europe as refugees and then moved to the UK after gaining citizenship of the first country of settlement, which grants them access to all the welfare benefits of that particular state, just like any other citizen. Yet, many decide to move to the UK as EU labour migrants, with all the restrictions this implies (see Broomfield

[1] In particular, when we look at the social-security domain of state-provided pensions, the generosity of the various EU states is quite different, so that a retired worker in the UK will receive a state pension (together with other benefits) worth around 29% of their previous earnings while, in the Netherlands, this goes up to 97% (OECD 2017).

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2014). Thus, from a welfare perspective, moving to the UK seems to be paradoxical at best.

In fact, despite the empirical evidence confirming these movements, this type of 'onward mobility' is still surprisingly poorly understood, leaving many questions unanswered. For example, little is actually known about these onward movers (e.g. age, marital status, gender), whether the movement stops there or what role the different welfare benefits – e.g. healthcare, unemployment or pensions – play in this move. Against this backdrop, this chapter explores the links between these 'onward movements' of EU citizens of refugee background and the particular social-protection arrangements in the domain of old-age pensions. This contribution unravels the considerations underlying the decisions of Sudanese migrants when moving to certain places to address social-protection needs, specifically those related to old age. To do so, this chapter draws on the life stories of members of different Sudanese transnational families, spread across the Netherlands, the UK and Sudan. In so doing, it highlights the socio-cultural embeddedness of old-age provisions and the ways in which mobility and resources are combined to cover for old-age needs. Rather than looking at the individual migrant, this research takes the extended family as the main unit of analysis. It shows that the different mobility arrangements in which Sudanese migrants engage have the double intergenerational aim of providing for their elderly parents back home on the one hand and securing their own pension on the other.

The chapter contributes to the current debates on migration and social protection, questioning the some of the assumptions about so-called 'welfare migration' (Giulietti and Wahba 2012). As I show, despite the availability of formal social-protection institutions in the first EU country of settlement, the informal circulation of resources within transnational families is deeply embedded in the practice of reciprocity and norms of social exchange rooted in the sending country. Analysing social protection from a transnational lens allows us to move away from nation states as the main 'containers of everything' (Serra Mingot and Mazzucato 2018). Welfare states thus become just one of the many resources that can be mobilised to provide generalised reciprocity and organise the old-age pensions of the different family members.

This chapter is based on data collected during 14 months of multi-sited and partly matched-sample ethnographic fieldwork with Sudanese migrants and their families across the Netherlands, the UK and Sudan (2015–2017). The Sudanese case is relevant for two main reasons. First, the Sudanese are a relatively small and new migrant group in Europe. This is important because new migrant groups face different migration and receiving contexts (Grillo and Mazzucato 2008) which might affect the ways in which they engage in the different social-protection practices. Second, in terms of legal status, the Sudanese are a highly heterogeneous group, including asylum-seekers, (un)documented migrants, refugees and citizens. This inevitably impacts on the rights of these different groups to access formal social protection.

The chapter is organised as follows. The next section provides a literature review on some of the current debates on migration and social protection, focusing on the

specific aspect of old age and pensions. It then zooms in on what it means to grow old in the Sudanese context. After discussing the data presented in this chapter and the overall methodological aspects of this research, I present and address the two main analytical points – namely, the access and provision of pensions both for the migrants themselves and for their parents. The last section concludes by summarising the main findings and pointing out the importance of addressing transnational social protection (TSP) from the perspective of extended families, which allows them to move between multiple locations (beyond one sending and one receiving state) throughout different moments in time.

13.2 Mobile Populations in Immobile Welfare Systems

Nowadays, more and more people choose or are pushed to live across national borders, developing attachments and responsibilities in more than one nation state – for example, by caring for family members, earning their livelihoods or saving for their old age in different countries (Levitt et al. 2017). Yet, traditional welfare states and their national social-security systems have been created to cater for the needs of sedentary populations – citizens mainly living within the borders of the nation state. This becomes problematic for people with increasingly mobile lifestyles and responsibilities that span beyond a single country. For instance, when moving to another country, migrants risk losing any contribution made to the formal social-protection system in the sending country, while often having to wait several years before having access, if at all, to formal social protection in the host country (Sabates-Wheeler 2009). Even when welfare provisions in the receiving country are accessible, migrants must often provide for their families 'back home' (Stark and Lucas 1988), who often lack access to formal social protection (if any) in their origin countries.

Transnational mobility has indeed obscured the clear-cut division between who should be socially protected by the state and who should not. It is not surprising, therefore, that, in recent decades, different aspects of migration and social protection have increasingly caught the attention of researchers and policy-makers. To date, research and policy have largely focused on the individual migrant's (lack of) access to the welfare state in the receiving countries in the Global North (Sabates-Wheeler and Koettl 2010; Sabates-Wheeler and Waite 2003; Van Ginneken 2013). This approach is problematic for two main reasons. On the one hand, it has perpetuated the idea that the Western industrialised countries – and by default their welfare systems – are the ultimate goal for any migrant. In so doing, they have largely neglected the role of other formal and informal social-protection institutions *here* and *there* – in both the receiving and the sending country. Although some of these studies acknowledge the important role of informal social protection, they mostly conceive of it in terms of filling the gaps of the formal system (Amuedo-Dorantes and Pozo 2006; Avato et al. 2010). Moreover, informal types of support are often addressed from a financial perspective, e.g. social networks in the receiving country

providing newly arrived migrants with financial help, or remittances which migrants send to cover the needs of those back home (Sabates-Wheeler and Waite 2003). On the other hand, the focus on the individual migrant in the receiving country has overshadowed a crucial element in the social protection of mobile populations – namely the role of migrants' families 'back home'. Indeed, even when welfare provisions in the receiving country are accessible, migrants are often responsible for providing for their families 'back home' (Stark and Lucas 1988). In fact, international migration does not necessarily sever the obligations between family members living apart (Baldassar et al. 2007). On the contrary, rather than an individual project of income maximisation in response to emergencies, migration is often a family livelihood strategy to diversify income sources, face up to socio-economic constraints and guarantee the wellbeing of the different family members (Sabates-Wheeler and Waite 2003; Stark and Lucas 1988). Yet, the increasingly restrictive and changing migration and welfare regulations lead many migrants to develop a series of strategies that encompass formal and informal resources from different institutions – often located in different countries – to cover not only for their own but also for their families' needs, now and in the future. Therefore, in order to understand such strategies, which combine formal and informal resources across borders, social protection is a more useful concept than social security or welfare, which are highly related to the support provided by the state. Social protection, on the other hand, is a broader concept as it includes different mechanisms of social-risk management provided not only at a public but also at a private, community and market level (Avato et al. 2009). For the purpose of this chapter, transnational social protection (TSP) is understood as the combination of provisions provided by the state (the social-security system), the market, the third sector and family and social networks to protect individuals and families against declining living standards arising from a series of basic risks and needs (e.g. employment, healthcare, housing, old age or education) across the borders of two or more nation states (De Neubourg and Weigand 2000; Devereux and Sabates-Wheeler 2004; Levitt et al. 2017).

13.2.1 Growing Old Across Borders

One of the main dilemmas faced by adult migrants – as well as their elderly parents 'back home' – is how to cope with the experience of growing old across borders (Zickgraf 2017). From the perspective of the migrants in the receiving country, their access to state-provided pensions might be limited or not enough. For example, research has shown that some benefits, such as contributory pensions, do not deliver comfort in old age for many non-European labour migrants, due to the higher unemployment rates among this group and to the fact that many work in low- and unskilled positions, which deliver lower levels of pension (Dwyer and Papadimitriou 2006). A similar situation happens for people who enter a country as refugees over the age

of 40, since they often have to wait several years to find a job and, even if they do, are unlikely to secure a sufficient number of years' employment to access contributory-pension benefits (Dwyer and Papadimitriou 2006). In addition, many of these migrants might wish to spend their retirement years 'back home', in which case the pensions built up in the host country might be lost, as they are not always transferrable.

In fact, the challenges attached to the aging of mobile populations have caught the attention of researchers and policy-makers alike, who have increasingly looked at aspects related to the accessibility and portability of pensions (Dwyer and Papadimitriou 2006; Holzmann and Koettl 2011). In an attempt to make the current social-security systems more mobile, a series of bilateral agreements have emerged in recent years to enable the portability of certain social benefits, especially pensions and healthcare, from a receiving country to a migrant's country of origin (Holzmann and Koettl 2011). Such agreements, however, face multiple challenges and only exist between a small number of countries (Van Panhuys et al. 2017). Moreover, the extent to which migrants make use of the portability of state-provided pensions for old-age arrangements remains highly unclear. In fact, qualitative studies have shown that sometimes family-provided care – which might or might not be available in the migrant's receiving country, since family members might be living somewhere else – is prioritised over the benefits of strong welfare states (Liversage and Mirdal 2017; Serra Mingot and Mazzucato 2019). Yet informal care might not be easily accessible, since family members might be scattered across the borders of more than one nation state, facing mobility restrictions.

Besides the problems related to the access and portability of their own pensions, migrants – especially those from countries with weak welfare systems – are often responsible for providing for their aging parents back home. In fact, although the geographical distance – coupled with shifting migration regimes and financial possibilities – affects the intergenerational contract, the latter continues to shape how family should be 'done' (Krzyżowski and Mucha 2014) throughout the different life stages, especially during old age. Growing old across borders, therefore, is a complex multi-dimensional process that has an impact on the different family generations and is affected by multiple factors such as the legal status of the migrants, the more-or-less strict migration regimes of the different contexts in which the migrants and their families live, the gender of those giving and receiving care, the sociocultural norms of the sending and receiving contexts or the financial resources of the families (Serra Mingot 2020a).

In order to understand how migrants make sense of and arrange their pensions to cover for their old-age needs (for themselves as well as for their aging relatives), it is important to look beyond the individual migrant in the receiving country and investigate how other non-state-provided resources are accessed and circulated across national borders. In this regard, as this chapter shows, mobility is a crucial element through which to fulfil personal and family old-age arrangements.

13.2.2 Aging in Sudan

> If you manage to migrate to Europe, or America, life is better, but you have no money... Sometimes I wonder why I spent 37 years of my life in the KSA [Kingdom of Saudi Arabia] and did not go to another country…

These are the words of Youssif[2] (67), the father of Salim (31), one of my respondents in the UK. I was very fortunate to meet Youssif in October 2016 because, by the time I conducted my fieldwork in Sudan, Youssif was in Egypt for healthcare reasons. He had undergone a cancer operation in Egypt, received chemotherapy in Saudi Arabia and continued with it in Egypt. He and his wife returned to Sudan just a couple of weeks before I left.

I met Youssif in their impressive three-storey house in a wealthy neighbourhood of Khartoum. He lived there with his wife, their younger son (who was about to start studying engineering) and their daughter with her three children (her husband worked in Iraq, so he mostly sent them money and visited them a few times a year). Since Salim and his older sister were working abroad, Youssif and his wife were renting two of the bedrooms in the house to some Chinese students. This was actually an important source of income during their old age. As we drank tea, Youssif told me about his experience as a labour migrant in Saudi Arabia. Like other Sudanese of his generation, Youssif had studied computer engineering in the UK, after which he had found a well-paid job in Saudi Arabia. When he could afford it, he married his wife, Munira, a Sudanese woman from Khartoum, who soon joined him abroad. His four children were born in Saudi Arabia but, when the eldest reached high-school age, his wife and children moved back to Sudan. This was (and still is) common practice among Sudanese labour migrants in the Gulf, since enrolling in Saudi universities is prohibitively expensive, thus encouraging families to return to Sudan or move somewhere else so that their children can attend university. Going to high school in Saudi Arabia, however, makes it more complicated for the children's future enrolment in Sudanese universities, entry to which depends on the score obtained in the Sudan School Certificate examination. Therefore, the most common solution for these families is for the wives and children to return to Sudan – either to the house that the migrant has managed to build over the years to provide security in their old age or to the husband's family house – while the husbands remain abroad working and only visit once or twice a year.

Youssif's story illustrates one of the oldest and most common transnational family arrangements in Sudan. It points to different aspects around which old age is organised, since the role of the state is clearly absent. Sudan, however, has a national Pensions Fund – one of the oldest in Africa and the Middle East – which covers the pension for those aged 60 with at least 20 years of formal contributions, the survivor's pension and disability pensions (Social Security Administration 2007). Yet, despite the apparent availability of a formal pension system, my fieldwork interviews and observations elucidated that often the pension received (if any) could

[2] Pseudonyms are used to ensure the informants' anonymity.

barely cover people's monthly food expenses, let alone their housing costs or medical emergencies. Therefore, those respondents who received a state pension needed additional support to survive, especially during old age.

In Sudan, therefore, the lack of a sufficient state-provided pension leaves most elderly people dependant on their children and extended families, who are fully responsible for their different social-protection needs (Adam and Yousif 2016; Gasim 2010; Mokomane 2013). Thus, as in other countries with weak or non-existent welfare systems, the reciprocal circulation of care, money and other resources in Sudan within extended family networks are crucial for the family's social protection and reproduction (Akuei 2005; Mokomane 2013). To cover for old-age needs, people in Sudan would follow different strategies. Sometimes, as in the case of Salim and Youssif, the migrants' parents had worked in well-paid jobs in the Gulf,[3] which had allowed them to save enough money to build a house. As Youssif's vignette shows, often many generations live in the grandparents' houses, so that financial and care duties are shared among family members. Renting some rooms or a small apartment within the family house compound was also a strategy followed by some families, which constituted an additional source of income to cover daily expenses. In some cases, besides building a house, the migrants' parents had set up a small business, which was now run by some younger relative, from whom they received a monthly revenue.

These arrangements, however, did not apply to all families. For many elderly people in Sudan the main source of financial security was the remittances sent by their children. Especially for healthcare emergencies, remittances are often the main – if not the only – resource. In recent years, the declining standards of public hospitals and the increasing privatisation of healthcare providers has resulted in prohibitively high healthcare costs that can only be afforded through remittances. Yet, the increase in the fees of medical services in Sudan has not seemed to translate into better services; on the contrary. Therefore, those who could afford it would often opt to receive treatment abroad, in countries such as Jordan, Egypt, Saudi Arabia, India, Thailand, Belgium or Germany. Affording healthcare abroad, however, requires the access and coordination of multiple resources, including money, care and housing. In the case of Youssif, for instance, Salim explained to me how his father's operation and treatment, which cost GBP 7000 (EUR 7800 approx.), was only possible through the money that mostly he and his siblings had put together. The financial costs of the operation were also lessened, thanks to the apartment that Youssif's brother owned in Cairo and where Youssif's wife could stay during the whole medical process.

The socio-cultural obligation to care for the elderly in the family does not only apply to the biological parents but also to other elderly relatives (e.g. aunts and uncles). This is because often the head of the family and his wife are obliged to provide for their own children, as well as their nephews, nieces and cousins (Adam

[3] People like Youssif, who work in the Gulf, are not entitled to receive any state pension even though, during their working years in the Gulf, they were bound to pay yearly taxes in Sudan.

and Yousif 2016). Once these children become adults, they are in turn responsible for caring not only for their parents but also for grandparents, aunts and uncles. Children become the most available and reliable source of insurance during old age (Adam and Yousif 2016; Nauck and Klaus 2007). Investing in the children – in terms of education and family values – is of high importance for families (Serra Mingot and Mazzucato 2019; Zickgraf 2017). The role of children as the main old-age insurance – in terms of care and income – is deeply rooted in Sudan. Thus, one way of ensuring a comfortable old age is often envisaged as providing the family's children – e.g. one's own children, grandchildren, nieces or nephews – with the best possible education so that, in the future, they can have a highly paid job with which they can better support their parents (and other elderly relatives). Youssif's case is an example of how education is the main trigger for the family return to Sudan. Therefore, it was quite common to find humble families making enormous financial sacrifices to send their children to 'the best' schools that they could afford.

This understanding of a pension differs from the traditional Western and nation-state-centric perspective, where the pension or old-age insurance is mostly understood as the regular payments made by the state – sometimes, to different degrees, also the market – to cover the basic needs of its citizens at official retirement age. Yet, as illustrated above, in Sudan, like in many other developing countries, the idea of the 'pension' is much broader and fluid and involves a combination of resources, in which often the state is not the most relevant one (Mazzucato 2008; Serra Mingot 2018). Therefore, research on old age and pensions can no longer be limited to the state, since growing old is shaped by migration and transnational practices (King et al. 2017). In order to understand how migrants make specific arrangements for their and their parents old age, it is important to analyse the 'pension' from a transnational lens, in order to be able to include elements of pensions *here* and *there* and to understand the role of such elements in shaping people's decisions to move.

13.3 Data and Methods

The data presented in this chapter are based on 14 months of ethnographic fieldwork conducted in 2015 and 2016 with Sudanese migrants in the Netherlands and the UK and their families back in Sudan. Multi-sited and partly matched-sample research was conducted using in-depth biographic interviews, informal conversations and participant observation with 43 respondents across the Netherlands and the UK and with 19 of the migrants' matched family members (mostly parents and siblings) in Sudan. Among the Sudanese respondents in the Netherlands and the UK, the majority were documented migrants, while only a few of them (in the Netherlands) had seen their asylum application rejected and become undocumented for several years, without access to any type of formal social protection (Serra Mingot and Mazzucato 2018). Among the documented, most of them had arrived in Europe through the asylum system and, after varying periods of time, had become either Dutch or British citizens. As such, they were entitled to welfare benefits like any other

citizen, including old-age pensions. Several UK respondents had moved from the Netherlands and thus, in some cases, matched samples spanned the Netherlands, the UK and Sudan, giving us a wider view of how migrants navigate the different social-protection systems. A matched-sample methodology is especially suited to studying old-age caregiving practices within transnational families, because it allows the researcher to sample individuals who are connected across different sites (Mazzucato 2009).

I conducted all the interviews and observations in English, Arabic or German, in familiar environments for the respondents – mostly in their homes. The interviews lasted between 2 and 4 h, while participant observation ranged from attending events with the participants (e.g. concerts or family get-togethers) to spending a full week living with them in their homes. Most interviews were recorded through note-taking, respecting the respondents' wishes. The in-depth interviews and observations allowed me to construct the life histories of the different family members and to explore how old age was experienced by both the elderly and their adult children.

Research participants were recruited through different gatekeepers and snowball sampling with different starting points. The sample included refugees and (un)documented labour migrants, split between men and women of ages varying between the early 20s to the late 50s and including single men, married couples and divorced parents with children. The educational backgrounds of the respondents varied, though the majority had a tertiary educational degree from Sudan.

13.4 Catering for Old-Age Needs Across Borders and Generations

Both in the Netherlands and in the UK, most of my respondents had access to state-provided pensions, since most of them had their respective Dutch or British citizenship, which they had obtained through the refugee system. Yet, for most of them, the idea of the state-provided old-age pension did not seem to be a major concern. Although many of my respondents in Europe were under 50 years old – and therefore they had more pressing issues to worry about than their own pension – two other factors should be considered. On the one hand, many of them had had to wait several years before obtaining refugee status and being allowed to work. For many, this long process had resulted in their being able to formally apply for a job for the first time in their 40s. In the current competitive labour market, many of these migrants struggled to find a job for years and, when they finally managed to, it was often in low paid and part-time positions. In the Netherlands, this was especially the case for women with children. Thus, they envisaged a rather low pension. On the other hand, most respondents, expressed their desire to grow old in Sudan, thus the expected returns of the welfare state in terms of pensions greatly lost their meaning in that neither Dutch nor British formal state-provided pensions can be transferred to Sudan. From this perspective, therefore, migrants for whom mobility is part of

their lives and future plans might face difficulties when it comes to securing their formal pensions through geographically fixed institutions. It might, then, be safer and preferable to invest in and rely on assets that will stay and allow a high degree of flexibility, now and in the future – assets such as their children, who are the most common old-age insurance in Sudan. This reflects deeply rooted socio-cultural norms of the key role of family in informally catering for all old-age needs.

13.4.1 Providing for One's Parents Pension

As explained above, many elderly people in Sudan survive through the support of their children, be it in terms of money, care or both. Yet many of my respondents, especially those in the Netherlands, heavily depended on welfare benefits for many years, which they often coupled with informal jobs. Although this income was often enough for the migrant and their nuclear family (if any) *here*, many families were not able to send substantial monthly remittances to their family members *back home*. Moreover, recurrent unexpected and highly expensive healthcare emergencies – especially for elderly parents, aunts or uncles – put these migrants in the difficult situation of having a duty to help but not being financially able to do so. As previous research has shown, the highly regulated Dutch society, with its strong welfare state aimed at helping 'the weak, the poor and the helpless' (Ghorashi 2005, 181), has had the unintended consequence of leaving many people dependent on the state for many years. As studies have shown, however, minimum and temporary assistance, together with room for interaction in the new society, facilitates and speeds up the refugees' participation in the labour market (Ghorashi 2005). Besides the long asylum process, during which asylum-seekers are not allowed to work, once refugee status is given, people must usually go on re-training programmes, which might take years. As Hanadi (43) and Ensam (44), two of my Dutch-Sudanese female respondents in the UK told me, respectively:

> In the Netherlands, even if you want to work in a supermarket, you have to go through one year of training.

> [The Netherlands] was good for providing study but not for providing work.

Even in cases where these refugees had obtained their Masters degree in European universities, they also had to repeat all or a great part of these studies. I was particularly able to observe that this was the case when my respondents had obtained their certificate in a Eastern European country or in Russia. Due to the close links that Sudan had with communist countries in the past, several people had studied for their degree in countries such as Poland, Romania or Russia. While some respondents had had their Russian certificates almost fully validated in the UK, the Polish certificate of another respondent was rejected in the Netherlands. For many of these people, therefore, moving to the UK was seen as a faster way to access the labour market and, therefore, money with which to support their families back home.

In some cases, being able to provide hands-on care for the parents was the main reason for leaving the Netherlands and moving to the UK. It is important to bear in mind, though, that, in past decades, migration regulations in the Netherlands and the UK have been in constant change. This affects different aspects of migration. For instance, the likelihood of being granted asylum or obtaining a visiting/medical visa for an elderly parent in the Netherlands or in the UK might vary greatly depending on the political agenda on migration at a specific moment in time. Yet, overall, obtaining visiting/medical visas seemed to be much more complicated in the Netherlands. As several respondents explained, they were not able to bring their parents to the Netherlands (INS 2020) for a visit due to the exorbitant financial requirements or other arrangements (e.g. living in a house of a minimum size to be able to host one or two people) they had to comply with. In comparison, the requirements in the UK are less strict.

This was the case for Ensam who, together with the lack of job opportunities in the Netherlands, moved to the UK primarily to be able to take care of her mother, who had been given a medical visa. In fact, the impossibility of bringing elderly parents from Sudan to the Netherlands due to the current immigration legislation was also a reason for some families to move to the UK. Sometimes, however, the process was quite complicated. This was the situation for one of my respondents in the UK, Hind (40). Hind was a Dutch-Sudanese citizen, who had arrived in the Netherlands as an asylum-seeker in the late 1990s. In 2005, however, her husband's mother became seriously ill in Sudan. Facing the restrictive migration regulations at the time and the resulting impossibility of bringing her mother-in-law to the Netherlands, Hind, her husband – also a Sudanese refugee – and two little children moved to Sudan to take care of her. Yet, after 2 years in Sudan, Hind realised that her children were struggling too much, in terms of both adaptation and educational achievements. Concerned for their future, the whole family moved back to Europe. Yet, instead of returning to the Netherlands, they moved to the UK, where the British regulations at the time allowed Hind to bring over her mother-in-law to receive the healthcare she needed, which had not been possible in the Netherlands.

13.4.2 Arranging One's Own Pension

When asked about their own old-age plans, many Sudanese respondents in Europe explained that providing their children with the best education possible was a priority and a form of old-age insurance. Indeed, throughout my fieldwork in different locations I observed how several respondents would invest a lot of resources to pay for their children's after-school lessons in order to have them obtain excellent grades and access 'the best' universities. As Mohamed (53), a British-Sudanese doctor in the UK who was unemployed as his certificate had not yet been validated, put it in a very straight-forward way: 'This is my insurance. I'm investing in them [his children] now'.

Providing their children with the best education and future opportunities was also one of the main triggers of 'onward migration' from the Netherlands to the UK (Ahrens et al. 2016). In the Netherlands, depending on both the end-of-primary-education test results (when children are around 12 years old) and, especially, on the teacher's advice, students are transferred into different types of secondary education (OECD 2016). As some studies have shown (Klooster et al. n.d.; OECD 2016), such advice often underestimates and discriminates against students of migrant background, hindering their access to tertiary education. This was perceived by many respondents as discriminatory and many of the Dutch-Sudanese families I met in the UK had actually left the Netherlands, where they had citizenship, for this very reason. Hind, whom we met above, moved to the UK to take care of her mother-in-law; she explained that her second reason for moving there was that she felt, based on the experiences of other Dutch-Sudanese who had moved to the UK, that the educational opportunities for her children were better in the UK than in the Netherlands. Although Hind held warm memories of her life in the Netherlands and cherished many of aspects of the country – such as the feeling of safety or the quality of the housing – she was concerned that the Dutch educational system would not give her children the same opportunities as the system in the UK.

Yet, despite these investments for the children, several respondents were also aware and concerned that their children, born into Western welfare systems, would not have the same feeling of 'duty' to provide for their ageing parents in the future in the way that they, the parents, had envisaged. This concern was tackled in different ways, depending on the family possibilities. For example, some families would take their children to Sudan for long holiday periods and to take part in family events (e.g. weddings, funerals), where they could witness family duties and social norms. At other times, migrants' duty to care for their aging parents was combined with socialising their children into it. This was the approach taken by Hind who, despite the difficulties of moving to Sudan with two little children to take care of her sick and old mother-in-law, was happy that she had brought her children along. As she explained to me:

> They learn that the parents are the first people they should take care of. As we learnt that from our parents, we taught that to our children, so they know how to help us and that they should take care of us.

In cases where face-to-face contact was not possible or was very sporadic, the children's socialisation took place digitally and was mostly implemented by their male relatives in Sudan or elsewhere, who would constantly call their grandchildren to discipline them on what to do and how to behave (Serra Mingot 2020b).

These examples show how the family and the intergenerational bonds of reciprocity among the different family members are the main pillar of old-age arrangements for transnational families, not only now but also in the future. That is, by showing their children how they take care of their own aging parents, these migrants are socialising them into the Sudanese socio-cultural norms of reciprocity. Such socialisation was, in fact, another reason that led some Dutch-Sudanese families to move to the UK. As one of my respondents explained, the Netherlands was often

perceived as a country with too much freedom and with a relatively small Sudanese community. In the UK, however, the Sudanese community was bigger and thus the children were more exposed to – and also controlled by – Sudanese Muslim values. As one of my Dutch-Sudanese respondents in the UK told me: '[In the UK] everybody is controlling everybody'.

13.5 Conclusions

This chapter has explored the links between the 'onward movements' of Sudanese-European migrants and the particular social-protection arrangements in the domain of old-age pensions. Through different cases, I have analysed the complex mechanisms guiding the decision of Sudanese transnational families to access and circulate certain resources in order to cover for the different old-age needs, now and in the future. Such mechanisms have been rendered visible through a transnational perspective and a multi-sited matched-sample methodology, which allowed me to expand the unit of analysis from the individual migrant, as is often done in the social-protection literature, to extended family networks, whose members are scattered across different countries. This has shown that old-age needs take place simultaneously and across different generations (e.g. migrants providing for their elderly parents while making arrangements for their own old age). Moreover, it has highlighted the crucial role of mobility and the geographical distribution of individuals in orchestrating complex social-protection arrangements, such as old-age pensions.

The multi-sited matched-sample analysis has shown how decisions around old-age arrangements entail accessing and organising resources (in terms of people, finances and care) over multiple locations. Analysing social protection in general – and old-age pensions in particular – through a transnational lens allows us to move away from nation states as the main 'containers of everything'. As the different cases presented in this chapter have shown, moving from the Netherlands to the UK is not based on assumptions of better state-provided welfare benefits. The analysis has shown that one of the main triggers of 'onward migration' is in fact the lack of possibilities for people to arrange their own and their families' social protection in the way that they envisage to be the best or the most appropriate. In taking into consideration the sending context and the sociocultural norms around old-age welfare protection, this chapter has provided evidence that these norms also travel and shape the ways in which old-age arrangements are made. Therefore, rather than talking about people moving to 'better welfare states', it seems more appropriate to talk about people moving to countries where specific resources are deemed better to cover for specific social-protection needs, such as education or possibilities for family-provided care in the UK. In fact, while the Dutch welfare state seems to be more generous, it is also more controlling, thus limiting people's capacity to work, bring over visiting relatives or follow a particular study path. In this regard the UK, although providing fewer welfare benefits, facilitates people's access to the labour market, access to the studies of their choice or the possibility to bring relatives over

for a visit or medical treatment. This flexible character of the UK, however, has to be taken with caution. For instance, while access to the labour market (regular or irregular) is easier and less controlled, this can lead to the exploitation of people who are in need of money (Batnitzky and McDowell 2011; Bloch 2008; Dell'Olio 2004; McGregor 2007).

Looking at migration and social protection from the perspective of the extended family shows that decisions to move or stay in a specific place are based on the migrants' and their families' needs and how best to fulfil them. In fact, what the cases have shown is that, in the current context of geographically fixed welfare systems and restrictive migration regimes, people with an extensive history of mobility or with a widely geographically scattered family face difficulties when it comes to safeguarding their social-security benefits like formal pensions because, if they moving to another country, such social-security rights might not exist. Therefore, the old-age pension is not envisaged in terms of receiving a state pension but in terms of having one's own children as the main providers of income and care. Investing in people (e.g., children) and other universal and mobile assets (e.g. education) that can move across time and space is therefore often the preferred option for these transnational families.

Finally, what this contribution has shown is the importance of looking at TSP not only as a translocal process but also as a trans-temporal one. Indeed, what the different cases have shown is that family arrangements are orchestrated to provide not only for current old-age needs but also for those occurring in the future. From this perspective, therefore, the different generations become involved and have a specific role to fulfil, which might mean moving to certain places in order to access certain resources to cater for particular needs.

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