

Migration – the value added?

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# **Migration – the value added?**

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## Introduction

From the beginning of human existence, people have been moving, looking for a better place. The main motive for these migrations was the search for more favorable conditions for development. People were looking for better soil for the cultivation of plants and animal breeding as well as for land rich in natural resources. In these times migration had a collective character and usually concerned whole tribes who would take all their possessions with them: plants for cultivation, animals and tools. Nowadays, migration has taken on an individualized form. In the 21st century people make the decision about departure from their place of inhabitation independently, or together with their families.

Migration is a very dynamic and variable phenomenon. Analyses of its trends to date lead to the conclusion that the phenomenon of migration will intensify in the near future and it will slowly embrace the whole world.<sup>1</sup> More and more people will decide to change their place of living, and each country will become both a source and goal of migration. Furthermore, migrants will belong to different social and ethnic groups, which will make distinctions between particular waves of migration (for example, migration for money, political migration and so on) practically impossible, and women will constitute the majority of migrants.

According to the experts of the World Bank, the increase in the number of migrating people will concern not only such countries as Poland, the Czech Republic or Ukraine, that is, countries that are going through economic transformations, but will also embrace highly developed countries<sup>2</sup>. For example, according to the British Institute for Public Policy Research's analysis of the emigration of British people, England is both a receiving and sending country. In 2005, 198,000 educated British people migrated from England<sup>3</sup>. The most popular countries of destination were: Australia, Canada, New Zealand, and the Republic of South Africa. A similar situation concerns Germany. In 2006, as many as 145,000 Germans left their country to seek their for-

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<sup>1</sup> See CASTES St., MILLER M.: *The Age of Migration. International Population Movements in the Modern World*. Palgrave Macmillan Press, London 2003.

<sup>2</sup> See *Report: Labor Migration Likely to Grow in Europe and Central Asia*, [online:] <http://www.world-bank.org>

<sup>3</sup> SRISKANDARAJAH D., DREW C.: *Mapping the scale and nature of British Emigration*. IPPR, 2006. [online:] <http://www.ippr.org.uk/publicationsandreports/publication.asp?id=509> (20. 12. 2006).

tune abroad. It is the biggest wave of emigration from Germany since 1954<sup>4</sup>. One can list more similar examples.

The level of economic development of Poland and Ukraine as well as Western European countries has a fundamental influence on the size of migration from these countries. The ratio of wages in, for example, Poland and Germany is presently very unfavorable for Poland. Unfortunately, leveling of the standards of living and wages in the countries of Eastern and Western Europe will not happen in the near future. The possibility of obtaining higher wages for similar work as well as better professional perspectives in another country will induce many people to depart.

Recently, migration has become a challenge for many countries – both for those from which the migrants depart and those that receive them. Migration produces many consequences, favorable or unfavorable, for these countries. This situation applies as well to Ukraine and Poland, as countries whose citizens go as migrants abroad to other European countries. Effects of migration are visible in different spheres of social life: political, social, economic and psychological. Additionally, many factors of an individual character have influence on the decision to depart. The present publication tries to answer selected aspects of the question regarding the value of migration to the various parties involved.

The main purpose of present volume is to answer the question: to what extent is migration an added value? The articles examine selected streams of migration from Poland and Ukraine and various accompanying phenomena as well as individual and social consequences.

Although the studies made by particular authors, collected in this volume, cover different aspects of migration, one can group the articles into three thematically similar sections. The first article is a study of the influence of migration on the security of the Polish state. Next, studies concerning the migration of Poles to Berlin, Great Britain and Norway are presented. In the second part, migration is presented as material (living), social and health capital. This article also deals with how the migrants cope with stress. This section also includes an article about the size of migration in the European Union, as well as actions aimed at monitoring and controlling this phenomenon, and finally, the disadvantages and advantages of European migration. The third part presents studies concerning migration in Ukraine. They show problems connected with the departures of Ukrainian people from their places of inhabitation and the influence of these departures on the family and the security of the state, including the economic, demographic and social aspects.

*Krzysztof Markowski*

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<sup>4</sup> ZDZIECHOWSKA M.: *Emigracja bezrobotnych*, 2007. [online:] <http://www.wprost.pl/ar/118661/Emigracja-bezrobotnych>.

Marek Lisiecki \*

## Migration as a real and potential threat for the security of the state

In studies made by international organizations and scientific-research centers, there have been efforts to define the basic concepts connected with security (international and internal), detailed retrospective and prospective identification of threats, classification of threats and efforts to determine the risk of their occurrence. For example, UN documents list among the phenomena threatening international security any event or a process which leads to a large number of fatalities or to lowering the survival chances of individuals and undermining the essence of the state as the basic unit of the international system. Six groups of threats have been identified as facing the world now or in the near future. These are:

1. economic and social threats, including poverty, infectious diseases and degradation of natural environment,
2. conflicts between countries,
3. internal conflicts, including civil wars, genocide and other large-scale disturbances
4. nuclear, radiological, chemical and biological weapons,
5. terrorism,
6. international organized crime<sup>1</sup>.

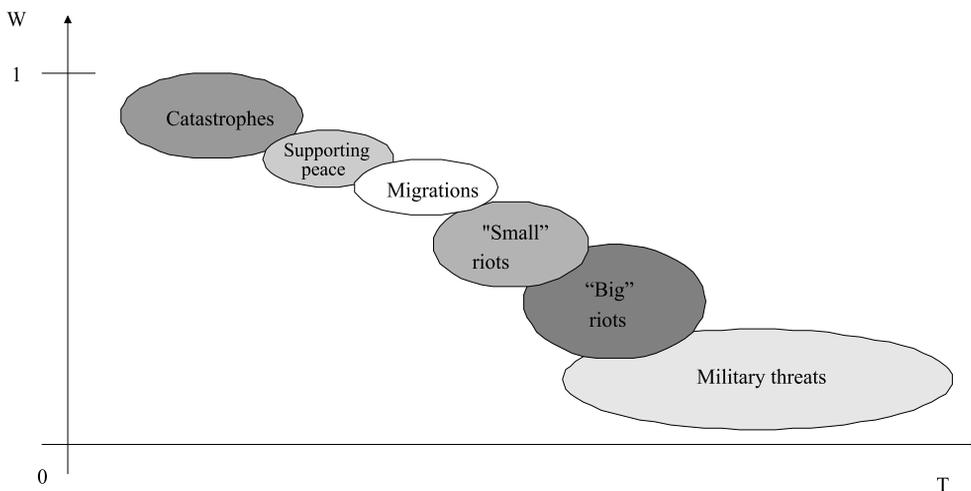
German researchers point to a somewhat different set of threats to international security – particularly European. Studies carried out in Germany indicate that the main threats which face Europe are: military threats, threats resulting from “big and small” riots, migrations, supporting of peace, catastrophes<sup>2</sup>. The risk of their occurrence, being a function of reach and the probability of their occurrence, is presented on graph 1.

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<sup>1</sup> FASSBENDER B.: *Reforma ONZ i bezpieczeństwo zbiorowe – UN Panel Report of High Rank for Threats, Challenges and Change from December 2004 and directions of the UN General Secretary from March 2005*. “Global Issue Papers” 2005, № 17, p. 11, [online:] www.boell.pl.

<sup>2</sup> RAULIER A.: *Gedanken zum militärischen Beitrag an die allgemeine Existenzsicherung*. „Allgemeine Schweizerische Militärzeitschrift“ 1997, № 11, p.10; LENARD S.: *Transgraniczny system obrony przed skutkami wypadków i katastrof na granicy polsko-niemieckiej*. AON, Warszawa 2000, pp.21-23 (unpublished doctoral dissertation written under M. Lisiecki’s direction).



Where: T – reach, W – probability, risk = W x T

Source: RAULIER A.: *Gedanken zum militärischen Beitrag an die allgemeine Existenzsicherung*. „Allgemeine Schweizerische Militärzeitschrift“ 1997, № 11, p.10.

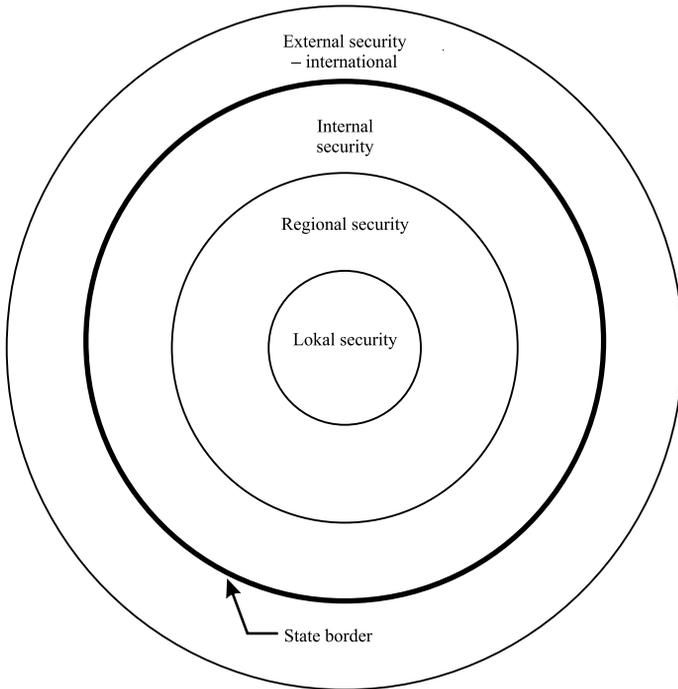
**Figure 1.** Risk of occurrence of specific events.

As shown on the figure 1, migration ranks among the basic threats to state security. In many countries, for example in Italy, France, and Spain, it is considered as the basic threat.

In order to talk about the level of real and potential threats accompanying migration one should first define this concept – ambiguously understood by everybody. Most generally, migration is the moving of population or a change of the place of habitation. This movement may be internal (within a given state), external (to or from other countries), temporary, permanent or relatively permanent. Taking into account the goal of movement one can talk about touristic, curative, earning or settlement migration. There can be many reasons for migration.

Despite the general recommendation included in article no. 13 of the Universal Declaration of Human Rights, passed by the UN General Assembly on 10<sup>th</sup> of December 1948, the rule that each human has the right to free movement and to the choice of his/her place of living, in practice this possibility is limited. Because of, and often under the pretext of defense of the national security, public order, public health, morality, laws and freedom of other people, rich countries isolate themselves from the poorer ones; they limit the possibilities of entry into their territory. Formal-legal limitations on movement cause the phenomenon of illegal migration. Thus, an important element which has influence on security is the proper protection of state borders (external borders of states, as in the case of the EU) and proper control of border flow.

The state border marks the division of national security into external security (international) and internal security (including regional and local) – see. figure 2.



**Figure 2.** *National security from system (comprehensive) – spatial perspective .*

Broadly understood, the protection of state borders embraces political, economic, ecological, sanitary, veterinary, and phytosanitary protection as well as protection from phenomena that can threaten public security (including public order). Political protection of the border includes the whole of activities taken in the country and abroad for safeguarding the sovereignty of the state and constitutional order. Economic protection embraces counteracting all phenomena which could impede the economic development of the state. Ecological protection of borders consists in the prevention of the inflow of pollutants and other substances threatening the natural environment. Sanitary, veterinary and phytosanitary protection consists in preventing the movement of illnesses threatening people, animals, and plants. An important element from the public security point of view is the protection of state territory (beginning at the border) from criminal elements.

Protection of the border, understood in this way, is realized by many subjects, which are determined in fundamental statutes, particular statutes and appropriate executive acts.

In a narrower understanding, protection of the state border consists in the control and maintenance of the border line and control of the legality of the movement of persons, goods and means of transport. The border line, the flow of people and goods have been the three basic elements of border protection for several thousands years (since the emergence of sovereign states). Only the quantitative and qualitative levels of migration and turnover of goods have changed over the years. Pathological phenomena have always accompanied this movement.

The contemporary movement across state borders has a mass character. Each country wants to have as much information about this movement as possible in order to steer it efficiently and prevent the pathological phenomena connected with migration and goods turnover. Countries want the quantitative and qualitative changes to be favorable for state interests (political, economic, cultural, scientific, etc.). On the other hand, they want the border movement to be efficient. Attaining these divergent goals is possible if the interested and neighboring countries:

- have a stable, comparable level of economic development,
- have a standardized visa policy and policies regarding going abroad,
- cooperate with each other to prevent illegal trade of intoxicants and weapons, illegal entries and illegal stays of people, tax and customs frauds, smuggling and other criminal phenomena,
- cooperate in range of environmental protection policies and actions.

The rules of cooperation are determined by appropriate international agreements.

The conditions presented above are fulfilled for example by the countries belonging to the European Union that are the members of so-called Schengen zone<sup>3</sup>. Therefore, from 1993, abolishing internal borders between these countries started to be possible – and in consequence, abolishing border and customs control. These controls in the countries of European Union are done at the external borders of these countries, with customs control usually being done not at the border, but inside the country, in places which are designed for this purpose. All of the international airports and harbors are treated as external borders. Particular attention is placed on entry control.

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<sup>3</sup> The name of the zone comes from the border city in Luxemburg, where in 1985 Belgium, the Netherlands, Luxemburg and Germany signed the agreement concerning the gradual abolishing of passport controls on internal borders, more strict controls on external borders and creating the Schengen Information System (SIS), gathering data about the undesirable and wanted people. This zone embraces presently all of the “old” countries of European Union, excluding Ireland and Great Britain, Norway and Iceland. There is already no passport control at the borders between the countries belonging to EU. Poland joined the Schengen zone at the end of 2007. This date depended mainly on the starting of the Polish National Information System as an integrated subsystem of the Schengen Information System (SIS, and exactly SIS II) and System of Information about Visa (SIV). The legal basis for such integration was included in: ustawa z 24 sierpnia 2007 r. O udziale Rzeczypospolitej Polskiej w Systemie Informacyjnym Schengen oraz Systemie Informacji Wizowej (Dz.U. Nr 165, poz. 1170).

Historically, the process of liberalization of border and customs control at Western European borders meant the transformation from independent controls conducted by each of the countries, to common control and then to control done by only one of the countries on the entry direction, selective control, and finally to abolishing control. Procedures of border and customs control at the borders of Poland are being similarly transformed. These changes are made selectively in agreement with neighboring countries. Significant changes in the defense system of Poland were made after accession of Poland and other countries (Czech Republic, Hungary, etc.) to the European Union. The eastern border of Poland became the external border of the Union. The effectiveness of its protection has an essential influence on the security of other European countries. The level of threats connected with migration depends on the level of human traffic across borders, the dynamics of which are presented in Table 1.

**Table 1.** *Border human traffic (total, Polish citizens, foreigners) from 1994 to 2005*

	Total	Polish Citizens	Foreigners
1994	217118132	68397227	148720905
1995	236940427	71868291	165072136
1996	262344378	87725839	174618539
1997	273884975	97658384	176226591
1998	274884868	97599335	177285533
1999	284845772	106657215	178188557
2000	281206348	111790977	169415371
2001	228588065	106410147	122177918
2002	191476930	90024206	101452724
2003	181048849	77443249	103605600
2004	198169484	74894225	123275259
2005	210526532	81901625	128624907

Source: Data of Border Guard.

As the data included in Table 1 indicate, the number of people crossing borders from 1994 to 2005 oscillated between 200 to 300 million. It means that every day the number of crossings of the Polish border reaches almost one million people. Therefore it is difficult not to agree with the thesis formulated earlier, that it is and it must be a phenomenon influencing the life of many citizens and the security of the country.

In the context of so large a stream of movement, the number of people stopped by the Border Guard for crimes and border violations is small. It ranges from 4000 to 7000 people a year, of which Polish citizens constitute about 20-40%, and the remaining part is constituted by foreigners – mainly from Ukraine, Russia, Moldava, Vietnam, Czech Republic, Germany, Belarus, Georgia, Armenia, and China. The “dark”

number of border crossers is significant and is confirmed among other things by the number of “tourists” trading at the Decade Stadium in Warsaw – often over a period of many months or even years. Thus, the traditional control at the borders should be to a larger and larger extent supported by controls within the country.

Some of the foreigners coming to Poland take up jobs, legally or illegally. In Poland, despite a significant level of unemployment, ranging from 15 to 20 percent, in recent years a systematic increase of employed foreigners has been observed – mainly in the professions and specialties in which adequate numbers of Polish workers are lacking. Employers more and more willingly employ foreigners, despite the time-consuming efforts and costs needed to solve all legal formalities.

Each foreigner who wants to legally take up a job in Poland must obtain the appropriate permission from the governor of the province where the company in which given person wants to work is located. This duty does not concern the citizens of the member states of the EU and countries with which the European Union has made agreements concerning the free flow of people<sup>4</sup>.

The complex and lengthy procedure for obtaining permission to employ a foreigner and the quite high charges connected with employment – since 1.01.2006 this amount has been equal to the minimal payment for work (if the employer just wants to extend the permission for work for foreigner, he is obliged to pay half of the minimal salary) drives many employers away. Some employers employ foreigners illegally.

Thus, in Poland we have a peculiar two-segment labour market when it comes to employing foreigners. It is characterized on the one hand by legal employment of foreigners, and on the other hand, by illegal employment, which according to estimations ranges from 50,000 to 300,000 people. A significantly smaller number of foreigners obtain legal permission to be employed.

According to the data from 2003, the most permissions were received by citizens of the countries of the old European Union – about 7845 people, most of whom are Germans – about 1865 and Frenchmen -1491. An equally numerous group was constituted by Ukrainians, who obtained in 2003 about 2750 permissions for work, Belarusians about 828 and Russians 698. Among the non-European countries, the Americans were most numerous group (permissions for work were issued for 846 people) as well as Turks (665 people). The biggest number – about 9300, over 50% of foreigners, took up a job in the Mazovian (Mazowieckie) province. Other leading provinces were: Silesia (Śląskie) (1500 foreigners took up a job there), Pomerania (Pomorskie) (1100 foreigners) and Great Poland (Wielkopolskie) (1000 foreigners)<sup>5</sup>.

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<sup>4</sup> All issues concerning the employment and work of foreigners on Polish territory are regulated by: ustawa z dnia 20 kwietnia 2004 r. O promocji zatrudnienia i instytucjach rynku pracy (Dz. U. Nr 99, poz. 1001) and by a series of directives of the Work and Social Policies Minister.

<sup>5</sup> MAIK P.: *Cudzoziemcy pracujący w Polsce*, 2007. [online:] <http://www.wokolkariery.pl/cudzoziemcy-pracujacy-w-polsce.xml>.

Analysis of the types of work done in our country by foreigners reveals that most of the citizens of the old EU member states work in such sectors as finances and industry, more rarely in trade. Russian citizens and citizens of the old Soviet Republics work mainly in trade and in education. On the other hand, Americans are very often employed as English teachers.

Presently, the scale of employment of foreigners in Poland does not influence in a significant way the situation of the Polish labour market. The number of foreigners working, either legally or illegally, in our country does not exceed 1% of the professionally active population. One should also add that people from abroad are allowed on the Polish labour market according to the rule of supplementing employment, not supplanting it<sup>6</sup>.

Some of the foreigners coming to Poland ask for permission to settle, for permission for a tolerated stay, for refugee status or temporary protection. The number of applications for refugee status submitted in the years 1992-2005, statuses granted, and the number of permissions for tolerated stay are presented in Table 2.

*Table 2. Number of applications, statuses granted, permissions for tolerated stay*

	Number of applicants	Statuses granted	Permission for tolerated stay
1992	567	75	.
1993	819	61	.
1994	598	391	.
1995	843	105	.
1996	3211	120	.
1997	3539	139	.
1998	3410	55	.
1999	3031	37	.
2000	4589	78	.
2001	.	.	.
2002	5153	280	.
2003	6903	216	23
2004	8079	315	846
2005	6860	335	1822
Total	47602	2207	2691

Source: Data from the Office for Foreigners.

Movement of people across Polish borders happens by foot or by different means of transport. Quantitatively, cars predominate (40-80 millions of border crossings

<sup>6</sup> Ibidem.

a year), followed by coaches (400-600 thousands a year), airplanes (about 100 thousands a year) – see Table 3. The number of lorries transporting goods across the border is significantly rising (the number of crossings in 2005 was three times greater than in 1994– rising from 2,7 million crossings a year to 9,0 millions). This increase in the number of lorries crossing Polish territory constitutes a significant threat to the security of its citizens.

**Table 3.** *Border movement of mechanical vehicles (cars, buses, lorries in thousands) from 1994 to 2005*

	Cars	Buses	Lorries
1994	61500	520	2720
1995	66900	560	2790
1996	75800	540	3480
2000	72245	509	4925
2001	54793	506	5441
2002	44964	503	5812
2003	43127	479	6174
2004	52891	508	7410
2005	58421	554	8968

Source: Data from Border Guard.

Border movement, the movement of people and movement of goods, has been consistently rising (as is confirmed for example by the number of lorries crossing borders yearly).

On the one hand, states are interested in simplifying the procedures controlling border movement (of people and goods). On the other hand, in their own interest and in the interest of the countries with which they have made agreements – bilateral and multilateral – states must guard against the pathologies connected with this traffic.

Trade with foreign countries is accompanied by customs crime and foreign exchange border crime. Customs crime and foreign exchange border crime consist in the conscious avoiding of payment of money owed to the State Treasury, such as: duty, taxes and other compulsory charges, and avoiding other requirements applying to imported and exported goods.

The phenomenon of customs crime and foreign exchange border crime – being difficult to assess – is an important problem because of the significant size of the losses incurred by the budget of the states through avoidance of customs and tax payments. Deceitful importers are also a significant threat for economic subjects trying to operate honestly as their lower prices make it hard for honest traders to compete.

Empirical identification of customs crime and foreign exchange border crime points to the following pathological phenomena:

- bringing in goods outside of customs control,
- customs fraud concerning quantity, quality and kind of goods and customs value of the goods,
- forging of certificates of origin of the goods,
- fictional re-export of the goods,
- fictional export of goods,
- fictional transit of goods,
- invalid accounting before the Treasury bodies of excise goods,
- import and export of goods forbidden by the law (threatening life and health of the citizens, stolen, “pirate” goods and so on),
- export of significant amounts of money without the permissions needed.

Pathologies accompanying migration need a special system of control. This control should not be limited to the border line. It should be carried out before the entrance to the country (first of all in the system of visa procedures), at the border line (however, because of the size of border flow its possibilities are limited) and to a larger extent than before inside the country – with well-developed operational identification of criminal phenomena. The Schengen Information System and Visa Information System will be of great assistance to Poland – as an eastern buffer of European Union in range of migration control. The efficient and effective control of migration into Poland influences and will influence the security of the whole European Union. The speed of abolishing border controls on our southern and western borders will depend on its efficiency and effectiveness.

## **Poles in Berlin: from germanization to globalization<sup>1</sup>**

### **I. Facts and Questions**

Polish migrations to Berlin have a two-hundred-year tradition. Initiated at the end of 18<sup>th</sup> century, they began to grow stronger in the 19<sup>th</sup> century, especially in its second half. As a result of the influx of newcomers, mainly from the Prussian Rule territory and also (though to lesser extent) from the other two Rules, a large Polish community was created. It had been growing in a non-linear way and its development was very intricate. Since the scope of this study does not involve the chronology of events, we will just mention that due to the recent migrations, this community remains quite large. Despite many recent studies on this issue, we still know surprisingly little about it<sup>2</sup>. The aim of this work is to pinpoint the results of the studies undertaken to date and to show the gaps in our knowledge. We will also attempt to enumerate significant issues and conduct an analysis about needed future studies on Polish migration in this metropolis. Thus, it is neither an overview of the literature on this subject nor a general description of the Polish community in Berlin. Instead, our aim is to pose several important questions, which would stimulate discussion on the current state of knowledge about this community.

The relevant questions can be divided into several sets. The first one concerns differentiating between various Polish migration streams going to Berlin. The second set refers to various communities that these streams created in the Prussian and subsequently German capital. The third set of questions concerns institutions and organizations created in Berlin by the Poles. The fourth set focuses on the development of integration and assimilation processes. All these questions encompass the former and current migration from the Polish territory to Berlin.

By comparing the 19<sup>th</sup>-century migrations to the current ones we are attempting to define basic similarities and differences between them. We endeavour to find

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<sup>1</sup> This text has been written within the research project MNiSW No. 3319/H03/2007/32, entitled "Poles in Berlin: new and old migration streams. The issues of integration and inner diversity of the immigration community".

<sup>2</sup> The general list of the relevant literature on the subject can be found in the references at the end of this text

certain universal patterns of modern migration processes. By modern we mean those that began at the end of the 18<sup>th</sup> century, in the era of transformations which have been taking place in Poland up to this day<sup>3</sup>. We also consider to what extent the Polish community in Berlin resembles other large Polish communities abroad.

Firstly, the geographical proximity of Berlin should be mentioned as it influences to a great extent the character of the Polish community in this city. In the period of the Partitions of Poland, the majority of Polish immigrants came from the Prussian Rule, situated close to Berlin, and these people did not have to cross any state borders. Thus, until 1918 this process was not regarded as a foreign migration. Nevertheless, it had an international character in the literal sense because the immigrants were changing social spheres and settled down in a new cultural environment. At the same time we are dealing here with migration from villages to towns, typical of the transformation era. To put it bluntly, a fast-developing metropolis in need of a labour force offered attractive jobs to people of nearby, less-developed and mainly rural areas. These newcomers included Germans, as well as Poles and Jews, and to lesser extent Czechs, Lithuanians and Russians.

The ethnic mosaic of the metropolis, both in the 19<sup>th</sup> century and at present, comprises a greater number of elements because Berlin has always attracted immigrants even from very remote locations. Without going into great detail, we should only mention that in the 19<sup>th</sup> century the Polish community occupied a low position in the hierarchy of immigrant communities in this metropolis. French Huguenots as well as Danes were the most privileged groups along with probably the Czechs. However, at the turn of the 21<sup>st</sup> century Poles are treated as culturally closer to the receiving community in comparison with Turks who are the largest immigrant community and the immigrants from the former Yugoslavia.

At the beginning of the 20<sup>th</sup> century, the Polish community in Berlin grew significantly with over 37,000 Poles registered as citizens of this city (year 1910). The real number of this community was estimated to be about 60,000-100,000 people. Nearly 100 years later (in 2005) slightly over 30,000 Poles are legally residing in Berlin and estimations regarding the whole Polish community (staying both legally and illegally) come to approximately 100,000. It should be pointed out, however, that the size of this community kept changing over the course of time depending on the political situation. For instance, just after World War I a significant number of Poles decided to return from Germany to the newly established Republic of Poland, which decreased the size of the Polish community in Berlin by two-thirds in comparison with the pre-war period. The reasons for this situation can be identified on both sides of the newly delimited borders. The idea of a new Polish state had a powerful impact

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<sup>3</sup> The issues of usefulness of the modernization concept in migration research are fairly complicated. I provide a concise overview in another text. Cf. PRASZAŁOWICZ D.: *Dawne i nowe migracje, dawne i nowe konceptualizacje w badaniach migracyjnych*. "Przegląd Polonijny" 2007, v. 33.

on the imagination of immigrants, although the Polish authorities did not have any active policy encouraging immigrants to come back. On the other hand, German authorities demanded that the immigrants choose the national option, which (in this case) meant declaring themselves German and accepting German citizenship. In this situation many immigrants decided to come back to Poland. It seems that the political breakthrough of 1989 did not have a similar impact. No come-back waves were noted. On the contrary, certain streams of Polish immigrants that had been flowing across the western border for some time became stronger, and most of the immigrants were going to Germany.

## II. Migration streams

Migrations from Polish territory have been flowing to Berlin from different sources. Many of these streams have given rise to counter-streams, i.e. alongside migrations to Berlin we are dealing with numerous return migrations. In migration research (in establishing a typology of migrations) we can distinguish long- and short-term migrations. Cyclic migrations are a characteristic form of short-term migrations, which also include seasonal and rotational<sup>4</sup> migrations. Apart from the last type, which is typical of contemporary migrations, all the other forms are present in the migration processes of Poles migrating to Berlin from the 19<sup>th</sup> century up to this day. Berlin's proximity to Poland seems to encourage more short-term and multiple migrations than we find in most other Polish communities abroad.

It should also be added that migration plans may change over the course of time, and some people who had originally planned a short-term stay abroad decide to stay there for good, whereas others who had planned to leave their country forever decide to come back home.

Among short-term migrations we could additionally distinguish shuttle migrations, usually defined as business trips. After 1989 the issue of border trade emerged, and those people involved in it would cross the border several times every day. Though it would be hard to describe Berlin as situated in the border region, still as an attractive market it was drawing people as powerfully as border outdoor markets. However, this type of migration is not typical of our times only. During the World War I Poles would go to Berlin to sell food<sup>5</sup>.

The proximity of the Polish territory played a significant role for people for whom Berlin was the place of permanent residence. There was a common practice of sending children during the holidays to relatives in the home country. It was popular in the

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<sup>4</sup> In rotational migrations a few people take turns doing the same job in such a way that in the place of one person that comes back home, somebody else arrives and takes over their duties.

<sup>5</sup> CZEBATUL M.: *Opowieści Marty z Szulców*. Nowy Tomyśl 1999.

19<sup>th</sup> century and continued until the Weimar Republic. The years of the Third Reich, World War II and the communist regime moved Berlin “away” from Poland. Even though this period continued for over 50 years, soon after it was over in 1989 the old patterns of social movement were revived. This phenomenon of Berlin’s “getting closer” and “further” from the Polish territory depending on the political situation is worth special attention and may be treated as one of the subjects for further discussion (which nonetheless goes beyond the scope of this text).

### III. Background differences

Various immigration streams in Berlin created culturally diverse Polish communities that often had nothing in common with each other. That was the case in 19<sup>th</sup> century and is the situation now. Thus, we are dealing with a group of immigrants that do not really exhibit typical community features (*Gemeinschaft* type as defined Ferdinand Tönnies) nor do they resemble an ethnic local community (as defined by the scholars from the Chicago School). Both earlier and now the most numerous communities are those of Polish economic migration, part of which stays and works in Berlin illegally. In the past, these were the workers who could not get by working in farming, and they became an unskilled labour force<sup>6</sup> in the cities. At present many seasonal workers take up the least prestigious jobs that do not require any qualifications and are low paid<sup>7</sup>. A significant group of people do jobs which are below their qualifications. In both time frames these groups shape the image of the whole Polish immigration community both in Berlin and elsewhere in Germany. These images have evoked stereotypes and prejudices against strangers. Thus, Poles have been stigmatized by the local communities.

It should be noted, though, that in the life of Polish community in Berlin there were also other groups. Jerzy Kozłowski, the author of many studies devoted to Polish migrations to Germany, points out that Polish gentry started migrating to Berlin at the end of the 18<sup>th</sup> century, just after the Partitions of Poland, to pursue their careers at the local court, state administration and Prussian Army<sup>8</sup>. The leader of this community at the beginning of the 19<sup>th</sup> century was Duke Antoni Radziwiłł, related by his wife to the Hohenzollern court, and their palace in Berlin soon became the center of Polish,

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<sup>6</sup> Ibidem.

<sup>7</sup> NORBERT N.: *Changing Rhetoric and Narratives: German Trade Unions and Polish Migrant Workers*. In: W.Spohn, A.Triandafyllidou (ed.). *Europeanisation, National Identities and Migration: Changes in Boundary Construction between Western and Eastern Europe*. London 2003, pp. 192-222.

<sup>8</sup> NORBERT N.: *Changing Rhetoric and Narratives: German Trade Unions and Polish Migrant Workers*. In: W.Spohn, A.Triandafyllidou (ed.). *Europeanisation, National Identities and Migration: Changes in Boundary Construction between Western and Eastern Europe*. London 2003, pp. 192-222.

German and European culture<sup>9</sup>. Atanazy Raczyński assembled a legendary collection of works of art in his Berlin palace<sup>10</sup>.

Polish refugees, fleeing from the Russian Rule after the national uprisings had been put down, also found shelter in Berlin. The warm welcome of the November Insurrectionists by a part of Berlin's elite was dubbed in German *Polenbegeisterung*<sup>11</sup>. Polish youth went to Berlin in great numbers to study<sup>12</sup>. From 1848 Polish MPs served in the Prussian Parliament (Landtag) and subsequently in the German Parliament (Reichstag)<sup>13</sup>. At the turn of the 19<sup>th</sup> and 20<sup>th</sup> centuries Polish artists such as Juliusz Falat, Wojciech Kossak and Stanisław Przybyszewski<sup>14</sup> were active in Berlin's artistic circles.

Apart from the aforementioned labourers' communities, the most numerous groups were the Polish craftsmen communities: bakers, butchers, carpenters, shoemakers and tailors<sup>15</sup>. The social structure of Polish immigrants in Berlin was completed by the poor about whom practically nothing is known.

Currently, among the Polish immigration community, the most privileged position is occupied by the Poles who are highly qualified and have prestigious jobs. They include computer specialists, engineers, artists and scholars. Other communities include skilled people and those who pursue careers such as cooks, nurses and building technicians. Another example would be the community of Polish students. Taken together, these groups are less numerous than the labourers' community. It should be noted, however, that this last community seems to be constant in size, whereas the other communities seem to be growing in number. This fact is quite significant because migrants possessing high and average skills as well as students stay in Germany legally. It means that with time the proportions between legal and illegal migrants may be changing in favour of the former.

The group of the unemployed complements the structure of the current Polish population in Berlin who stay in Germany legally and hence are entitled to various social security benefits<sup>16</sup>.

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<sup>9</sup> Potocka Maria Małgorzata z Radziwiłłów, *Z moich wspomnień (Pamiętnik)*, London 1983.

<sup>10</sup> WARSCHAUER A.: *Zur Geschichte der Gemälde-Sammlung des Grafen A. Raczyński*. "Historische Monatsblätter für die Provinz Posen", 1904.

<sup>11</sup> KOZŁOWSKI J.: *Rozwój organizacji społeczno-narodowych wychodźstwa polskiego w Niemczech w latach 1870-1914*. Wrocław 1987.

<sup>12</sup> MOLIK W.: *Polskie peregrynacje uniwersyteckie do Niemiec 1871-1914*. Poznań 1989.

<sup>13</sup> TRZECIAKOWSKI L.: *Posłowie polscy w Berlinie 1848-1928*. Warszawa 2003.

<sup>14</sup> Potocka Maria Małgorzata z Radziwiłłów, op. cit.

<sup>15</sup> BERKAN Wł.: *Życiorys własny*. Poznań 1923.

<sup>16</sup> CYRUS N.: Die aktuelle Zuwanderung aus Polen nach Berlin. [In:] KAPPLAN A.: *Paris-Berlin. Formen und Folgen der Migration*. Berlin 1999.

#### IV. Ethnic institutions and organizations

Except the poor, each of the aforementioned communities created in Berlin their own associations and institutions. It was not easy as the Polish immigrants did not have their own district. They were scattered, residing mostly in the districts of East Berlin, Wedding, Moabit, Kreuzberg and Friedrichshain as well as in the suburbs of Charlottenburg, Spandau, Schöneberg, Lichtenberg, Neuköln and Weissensee, which in 1920 were incorporated into the city limits. Thus, in Berlin there was no local community, which in other Polish communities abroad would become the basis for ethnic organizational activity.

Due to the persecutions which the Poles were subjected to both from the city council and the authorities of the German Roman Catholic Church, the immigrants could not establish their own Polish parish. These repressions were stronger or weaker depending on the time period, but generally speaking, all the immigrants were expected to assimilate quickly in the 19<sup>th</sup> century. The authorities hampered the implementation of social initiatives aimed at helping the newcomers preserve their cultural identity. Migration studies clearly indicate that the ethnic parish is usually a centre of immigrant social life, and different associations are created around it and its rooms are used for meetings and other social events. This phenomenon pertains not only to Polish migrants.

Very often the impossibility of establishing an ethnic parish leads to disintegration of the immigrants' community, and as a result this community is absorbed by the immediate environment. The lack of ethnic parishes made cultural and social activity more difficult. It might have also been the main reason for the lack of integration of the whole Polish immigration community in Berlin. A network of ethnic parishes would probably have made it possible to transform this group into a real community.

The German Roman Catholic Church was aware of how important the native language is in sustaining the faith. Not wanting to lose the worshippers, it would send clerics who spoke Polish to those parishes in Berlin which had Polish worshippers. However, they were not Polish priests but Germans who had attended relevant language courses. Between 1885 and 1887 Reverend Władysław Enn, a Pole supporting the ethnic activity of immigrants used to work in the Parish of St Pius in Friedrichshain, but after a short period he was sent back to Poznańskie province. He was replaced by Reverend Wilhelm Frank from Silesia who knew Polish, albeit declared himself a Prussian.

However, the Poles found a way to combine their spiritual life with ethnic activity, i.e. they established within Berlin's parishes their own parish circles. With time these circles became the most popular type of Polish associations in the city, and in 1903 they were united in a federation. Alongside these circles there were also craftsmen's associations grouping the craftsmen, and local circles not extending beyond the district

or immediate neighbourhood. These were the associations of hairdressers, bakers or shoemakers. Apart from their corporate aims, they also performed important cultural and social functions.

Another form of Polish associations were task-oriented organizations whose aim was to perform specific tasks. The educational associations faced the biggest challenges and very often had to operate outside the legal system. Teaching Polish had been forbidden over a long period of time, and thus it was impossible to open a Polish school in Berlin. However, the immigrants managed to overcome different obstacles and in place of one dissolved organization (Polish Educational Society was dissolved by the authorities in 1885) they created new ones. Other examples of task-oriented associations include choirs whose traditions were largely adapted from German culture, sports organizations (modeled on Turnverein), charity associations, theatre circles etc.

All these organizations established in 1894 a central unit – The Committee for Polish Associations in Berlin, which subsequently changed its name to The Union of Polish Associations in Berlin<sup>17</sup>. Earlier, from 1867 the elitist Society of Polish Industrialists provided patronage for local Polish circles which were emerging at that time in great numbers. From the end of 19<sup>th</sup> century the Savings and Loan Association ‘Skarbona’ (1896-1920) was of great help. Political clubs were complementing Polish organizational life including the Berlin unit of Polish Socialist Party (PPS) as well as the Polish local press, mainly ‘Dziennik Berliński (‘Berlin Daily’). However, attempts at creating The Polish House which would be the centre of ethnic community ended in failure (until the outbreak of World War I). Paradoxically, The Polish House was opened in the interbellum period, when the community was smaller. It opened just before the introduction of the nationalistic policy by the Nazis, which prohibited any manifestations of ethnic diversity.

The current situation of the Polish community in Berlin differs significantly from that of past groups. Presently, the Poles have their own chaplaincy in Berlin which has been operating since 1981, and since 1986 they have had their own independent seat. First, it was the Templehof Church, and since 2004 it has been the Basilica of St John the Baptist in the district of Kreuzberg. As is usually the case with immigration communities, the ethnic chaplaincy, apart from fulfilling various religious purposes, performs other additional functions. It helps the immigrants to find work and accommodation, provides counseling, organizes trips and other cultural events and takes care of the children. Thus, it is one of the centers around which the activity of Poles in Berlin is focused.

Poles, no longer under pressure to abandon their cultural heritage, receive support from the local authorities for their ethnic activity. Thus, the mass media which serve the community of Polish immigrants, including radio programmes, newspapers and

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<sup>17</sup> KOZŁOWSKI J.: op. cit.

web portals, are partially financed from city funds. The Polish Social Council which provides employment, counseling and information about immigrants' rights is also subsidized by the council.

Nowadays it is easy to find a Polish-language course in Berlin; such courses are frequently offered at the local universities. The institutions of the receiving community take care of courses for Polish immigrants. Polish clubs and associations are still very popular. Some of them, situated in Kreuzberg represent youth alternative culture, which in the postwar era became one of the showpieces of Berlin. Hence, fulfilling their cultural inspirations, Polish immigrants join an important stream of the receiving culture while not cutting themselves off from their own roots.

## V Integration and assimilation

Currently, the immigrants can integrate in the place where they have decided to settle down and at the same time preserve their native culture. Without going into complicated definitions let us only indicate that integration is understood as newcomers' entering the new environment, which enables them to function well in the conditions they encounter. On the other hand, assimilation was for many years treated as a one-way process leading to a unilateral immigrant adaptation to the new environment<sup>18</sup>. Such a view assumed that immigrants would reject their cultural "baggage". The conceptualization of the assimilation process corresponds to the analysis of the situation of the Polish community in Berlin from its beginnings until World War II. Indeed, in those days there was no room for the ideas of cultural pluralism. It should not come as a surprise since that was the time of building a modern nation-state, in which nationalistic ideology played a crucial role. German nationalism assumed future domination over their Eastern neighbour. From this perspective, the Poles were obliged to defend their cultural identity.

In this way large-scale politics determined the situation of Polish immigrants in Germany. The leaders of the Polish community tried to counteract assimilation by establishing different institutions and organizations. However, according to the data presented by Kazimierz Rakowski, at the beginnings of the 20<sup>th</sup> century only 5,000 Poles were engaged in the life of immigrant community<sup>19</sup>. And although Rakowski estimated the size of the whole community as 60,000 (which was much less than his fellow scholars' estimations) the number of those who were engaged in the life of the group is not very impressive. Rakowski cites numerous examples of integration and

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<sup>18</sup> GORDON M.: *Assimilation in American Life. The Role of Race, Religion and National Origins*. New York 1964.

<sup>19</sup> RAKOWSKI K.: *Kolonia polska w Berlinie*. Biblioteka Warszawska, Warszawa 1901, pp. 234-272.

even assimilation of Polish immigrants<sup>20</sup>. He also notes that migrants from the Polish territory very often did not have a fully fledged Polish identity before they left their homeland. It should also be added that the process of social advancement experienced by the immigrants in a modern metropolis opened the door to the German middle class. Thus, the impressive ethnic activity of Polish immigrants in Berlin was happening simultaneously with fast-moving integration and even total germanization. The least susceptible to assimilation were probably those people who after World War I decided to go back to Poland. However, we do not have any data which would confirm that these people had played an active role in any Polish structures in Berlin.

Today migrants are not expected to reject their cultural identity. Moreover, the assimilation is defined in a more flexible way. It is a process in which:

*“ethnic identity and the cultural and social differences which are naturally connected with it are diminishing. It means that this identity is becoming less and less visible and the cases where it plays an important role are becoming less frequent and refer to the fewer aspects of social life. Ethnic origin of the individual is becoming less important in their relationships with members of other ethnic groups (usually, but not only with the dominating group) and people at the both sides of the border start to perceive one another as more and more alike as long as they are close with respect to each other’s cultural features, for instance class membership (...). Such definition intentionally assumes a possibility that in the course of this process, the nature of the main stream of culture, to which the individuals and minority groups assimilate, changes. (...) The dominating group may change in such a way that it will begin to accept the members of ethnic and racial groups, which were previously formally excluded”*.<sup>21</sup>

As can be observed, the concept of assimilation, which was considered by some migration research as politically incorrect has returned in a modified form as a useful cognitive paradigm. It is coherent with the concepts of cultural pluralism and helps to explain the changes which immigration communities undergo. For instance, if the immigrants can obtain financial support from the city council for their ethnic initiatives, it means they are well adjusted to the new environment. This situation is best explained by the concept of trans-nationality, i.e. the migrants’ ability to function easily within two (or more) cultural dimensions simultaneously.

## VI Remarks on the gaps in our knowledge

One of the purposes of this text has been to sketch the issue of Polish migrations to Berlin in a longer time frame and to prove that the stereotypical picture of this im-

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<sup>20</sup> PRASZAŁOWICZ D.: op. cit.

<sup>21</sup> RICHARD A., NEE V.: *Remaking the American Mainstream. Assimilation and Contemporary Immigration*. Cambridge, MA 2003.

migration group is far from reality. The main purpose of this study has been to pose several questions which would stimulate a discussion on what we know about this group. Even more puzzling seem to be the issues we know nothing about. Pondering on what we actually do not know may wake us up to the fact that particular research is usually conditioned by the current needs of a given community. Up till now most of the researchers have actually been posing the same questions. They were preoccupied with the extent to which Poles managed to protect themselves against assimilation. Such issues served a very important therapeutic role at a time of threats to the national existence. Moreover, by constructing a collective memory focused on heroic elements these issues strengthened the Polish sense of identity.

Much less emphasis was laid upon the complexity of migration streams flowing from the Polish territory (the first highlighted set of questions at the beginning of this text). The return migrations were actually not analyzed at all, even though it is a very important social phenomenon. Some amount of attention was devoted to selected migration groups (the second set of questions); however, their lives were not fully presented. We find little in the current research on where the Poles used to work, how much they earned, where and in what conditions they lived in and how they spent their free time. In short, the relevant literature on this subject sheds little light on the everyday life of the immigrants.

We know most about the organizations and institutions which immigrants established abroad (the third set of questions). Their activity was recorded by means of reports and other documents; there are the reminiscences of the leaders, and articles by the immigration press. Thanks to these pieces of information we know how Poles defended themselves against assimilation. This is exactly the heroic element of our common past. However, we know almost nothing about those who gave in to assimilation (the fourth set of questions). They did not leave any written records. Even if they had tried to describe their experiences, they would probably not have been able to find the right words to do it adequately.

When comparing the 19<sup>th</sup>-century migrations with contemporary ones we find surprisingly many of the same patterns of behaviour and same survival strategies adopted in the new environment. It is obvious that a modern metropolis such as Berlin still draws huge numbers of people from less-developed areas. In the streams of immigrants flowing to Berlin, economic migrants still dominate. Alongside these economic migrants, however, (both in the past and currently) there are other migration streams from Polish territory, and as a consequence the backgrounds of the Polish community in Berlin are quite diverse.

At the same time we notice a defiant struggle to maintain cultural continuity on the part of the migrants and, on the other hand, sweeping changes concerning their individual and community lives. These processes should be the subject of further scientific analysis. Moreover, we would like to know more about multiple migrations and

changes in migration plans. Additional studies showing the trans-nationality present in the life of Polish community in Berlin from the 19<sup>th</sup> century would also be more than welcome. The proximity of Polish territory made it possible for the migrants to function simultaneously in two cultural dimensions – Polish and German. The unfavourable attitude of the Prussian authorities, on the one hand, and the proximity of Poznań, which is an important centre of Polish culture, on the other, meant that Poles never built an ethnic institutional completeness<sup>22</sup> (Breton 1964). Nonetheless, throughout the course of time this community has successfully managed to preserve its identity. At the same time it functions completely differently than other Polish communities in places such as Paris, London or even Vienna.

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<sup>22</sup> BRETON R.: *Institutional Completeness of Ethnic Communities and Personal Relations of Immigrants*. "American Journal of Sociology" 1964, nr 2 (vol. 20).

*Dorota Miłek \**, *Bartosz Jóźwik \*\**

## **Recent Migration from Central and Eastern Europe to the UK**

### **Introduction**

On 1 May 2004 ten countries joined the EU (A10) – eight Central and Eastern European countries (A8), Cyprus and Malta. The EU guarantees free movement of workers (FMOW) for all its citizens. However, as with previous enlargements, existing Member States had concerns about the impact of complete liberalisation on their labour markets.

Citizens of Malta and Cyprus already had relatively free access to the EU labour market, especially to the UK which had large Cypriot and Maltese communities. As for the A8, most of the EU-15 chose to impose restrictions in one form or another. The UK, Ireland and Sweden were the only exceptions that granted people from the A8 free access to their labour markets.

This article describes the key features of migration to the UK since accession with special reference to migration from Poland. The article also evaluates the impact of migrant flows from these new Member States on the UK economy.

### **A8 migrants in the UK – data**

It is difficult to get an exact estimate of the size of the flows of individuals from the A8 countries to the UK after accession. It is unclear what proportions of such workers are long-term migrants and what proportions are in the UK for a short time and have subsequently returned home, perhaps to return to the UK again in the future.

In the UK there are four main sources of data on the flows of A8 individuals: Worker Registration Scheme, International Passenger Survey, National Insurance Numbers and Labour Force Survey. The below data are drawn from the Worker Registration Scheme.

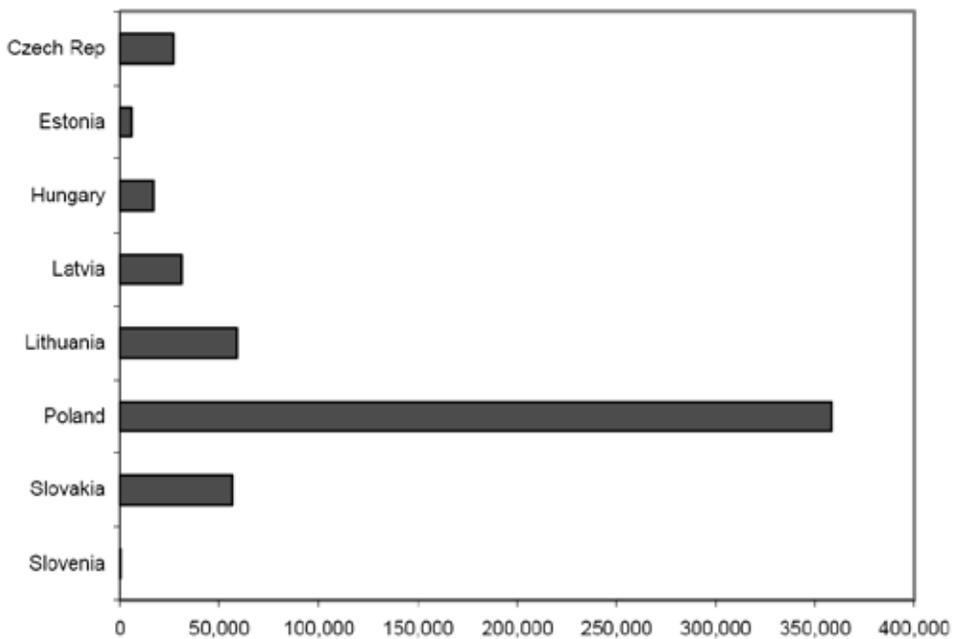
A cumulative total of 579,000 applicants registered with the Worker Registration Scheme (WRS) between 1 May 2004 and 31 December 2006. But these data do not

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indicate the number of long-term migrants of A8 workers in the UK, as most of those registered come for only short periods<sup>1</sup>.

The highest proportion of applicants were Polish (65% of the total), followed by Lithuanian (11%) and Slovak (10%) applicants. While the number of Polish applicants in 2006 increased by 25% compared to 2005, the number of Czech Republic, Lithuanian, Estonian and Latvian applicants decreased by over 25%<sup>2</sup>.



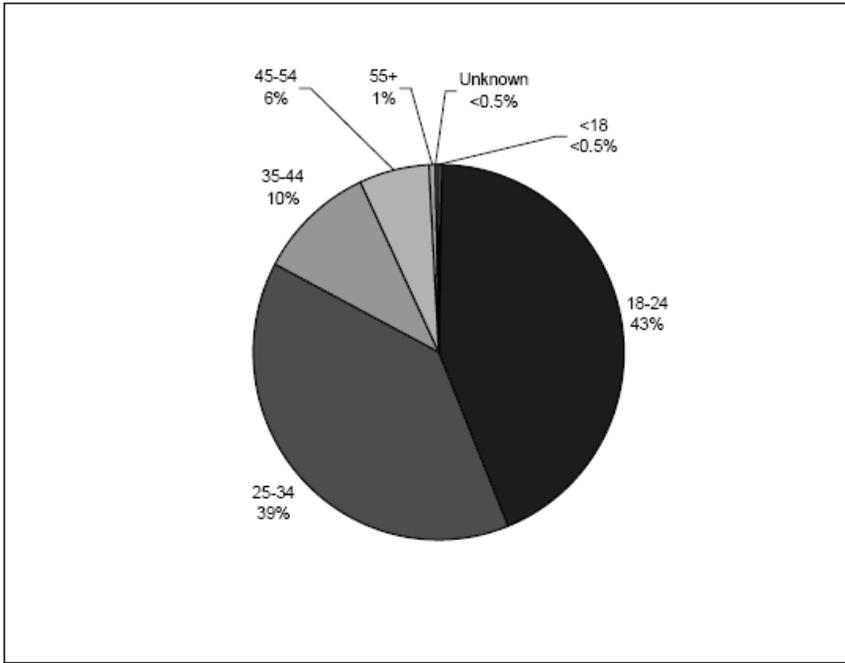
Source: *Accession Monitoring Report May 2004 – December 2006*. Home Office, Department for Work and Pensions, HM Revenues & Customs, Communities and Local Government, 2007, p.8.

**Figure 1.** *Nationality of applicants, May 2004 – December 2006.*

Of those who applied between May 2004 and December 2006, 82% of registered workers were aged 18-34 (figure 2).

<sup>1</sup> *Accession Monitoring Report May 2004 – December 2006*. Home Office, Department for Work and Pensions, HM Revenues & Customs, Communities and Local Government, 2007, p.4. [Online:] <http://www.ind.homeoffice.gov.uk/6353/aboutus/accessionmonitoringreport10.pdf>

<sup>2</sup> *Ibidem*, pp. 8-9.



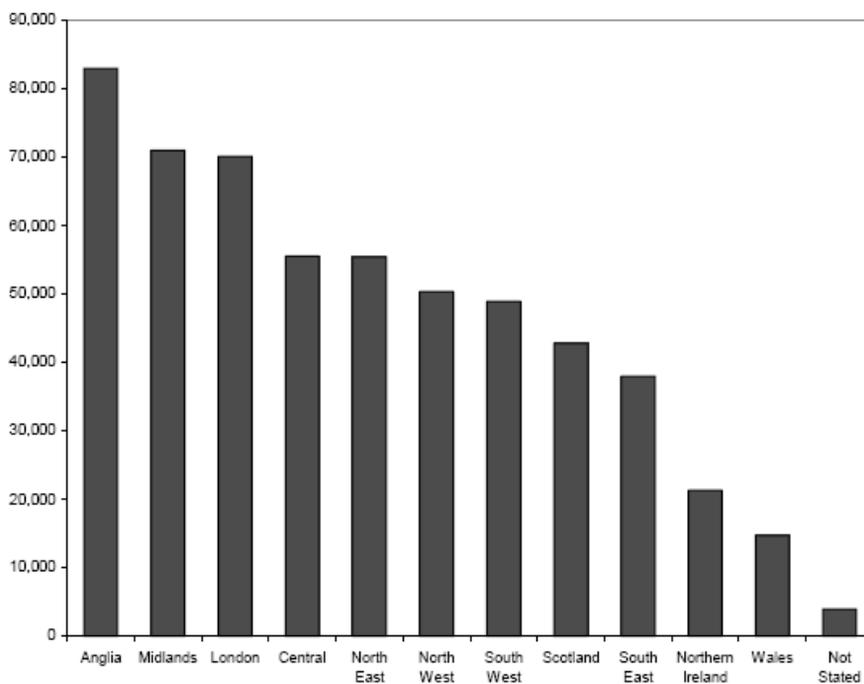
Source: *Accession Monitoring Report May 2004 – December 2006*. Home Office, Department for Work and Pensions, HM Revenues & Customs, Communities and Local Government, 2007, p.10.

**Figure 2.** *Age of registered workers, May 2004 – December 2006.*

Administration, Business & Management was the top occupation group for registered workers who applied between May 2004 and December 2006. The proportion of workers working for employers in that group increased from 25% in 2004 to 49% in Q4 2006. The group has overtaken Hospitality & Catering as the group that has employed the most A8 workers since 2004 (the proportion in Hospitality & Catering fell from 27% in 2004 to 17% in Q4 2006). Agriculture is another group where there has been a considerable change over the period, reflecting the seasonal nature of the work. The proportion of workers who were employed in that sector peaked in the summer months, reaching 17% in Q2 2005, and was lowest during the winter months with only 4% in Q4 2006 and 5% in Q4 2005<sup>3</sup>.

Anglia had the greatest number of workers registering with employers in the area, with 15% of the total. This was followed by the Midlands and London, both with 13% of the workers registered. Northern Ireland and Wales had the fewest registrations with respectively 4% and 3% of the total (figure 3).

<sup>3</sup> Ibidem, p.13.



Source: *Accession Monitoring Report May 2004 – December 2006*. Home Office, Department for Work and Pensions, HM Revenues & Customs, Communities and Local Government, 2007, p.18.

**Figure 3.** *Geographical distribution of employers of registered workers, May 2004 – December 2006.*

## The impact on the UK economy

The literature from across many countries offers little or no evidence that immigration has had a major impact on native labour market outcomes such as wages and unemployment<sup>4</sup>. Recent work on the UK by a number of researchers is also consistent with this view. For example, research carried out on behalf of the Department for Work

<sup>4</sup> For example, the 2006 European Commission report concluded that mobility between the EU-10 and the EU-15 is very limited and is simply not large enough to affect the EU labour market in general. The International Organisation for Migration wrote that in a wide variety of jobs in Western Europe there is hardly any direct competition between immigrants and local workers. Other studies, including Australian, Canadian, French and Norwegian, also fail to show negative effects (or found very small effects) of immigration on labour market outcomes. Based on: BLANCHFLOWER D., SALEHEEN J., SHADFORTH C.: op. cit., pp. 18-19.

and Pension<sup>5</sup> found no discernible statistical evidence to suggest that A8 migration has been a contributor to the rise in unemployment claims in the UK (between January and December 2005 unemployment claims in the UK rose by over 900,000 and it had been suggested that part of the explanation for this rise is the inflow of migrants from the new EU Member States). The evidence presented in the report supported the view that, overall, the economic impact of migration from the new Member States has been modest, but broadly positive, reflecting the flexibility and speed of adjustment of the UK labour market<sup>6</sup>.

It is difficult to determine the overall impact of immigration, including immigration from the A8 countries, on inflation and economic growth in the UK. This is because immigrants are both consumers and workers/producers, and so immigration affects both aggregate demand and aggregate supply.

Research carried out by the Bank of England and other research showed that the workforce in the UK has increased in size as a result of adding a group – the A8 – with a relatively low propensity to be unemployed and to claim benefits. The A8 migrants have likely reduced the natural rate of unemployment through their impact on the wage bargaining process, lowering the bargaining power of native workers<sup>7</sup>.

On the aggregate demand side, it is likely that immigrants spend a lower fraction of their income compared to domestic workers, perhaps because they send remittances back home or spend less on durable goods while temporarily in the UK. However, the funds that migrants send home might be recycled back to the UK through greater export demand, and UK customers might also benefit from lower prices as a result of the extra productivity of migrants. Aggregate demand might also rise because of increased investment<sup>8</sup>.

On balance the Bank of England suggested that recent A8 immigration has acted to reduce the natural rate of unemployment in the UK and has raised the supply potential of the economy. The Bank also suggested that recent immigration is likely to have raised potential supply by more than it has raised demand, and therefore has acted to reduce inflationary pressure<sup>9</sup>.

As a result, HM's Treasury included net migration as a key reason for raising its estimate of future economic growth to 2.75% from 2.5% in last December's pre-budget report.

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<sup>5</sup> *The Impact of Free Movement of Workers from Central and Eastern Europe on the UK Labour Market*. Department for Work and Pensions, 2006. [Online:] <http://www.dwp.gov.uk/asd/asd5/WP18.pdf>.

<sup>6</sup> *Ibidem*, p.1.

<sup>7</sup> BLANCHFLOWER D., SALEHEEN J., SHADFORTH C.: *The Impact of the Recent Migration from Eastern Europe on the UK Economy*. 2007, pp. 23-24. [Online:] <http://www.bankofengland.co.uk/publications/speeches/2007/speech297.pdf>.

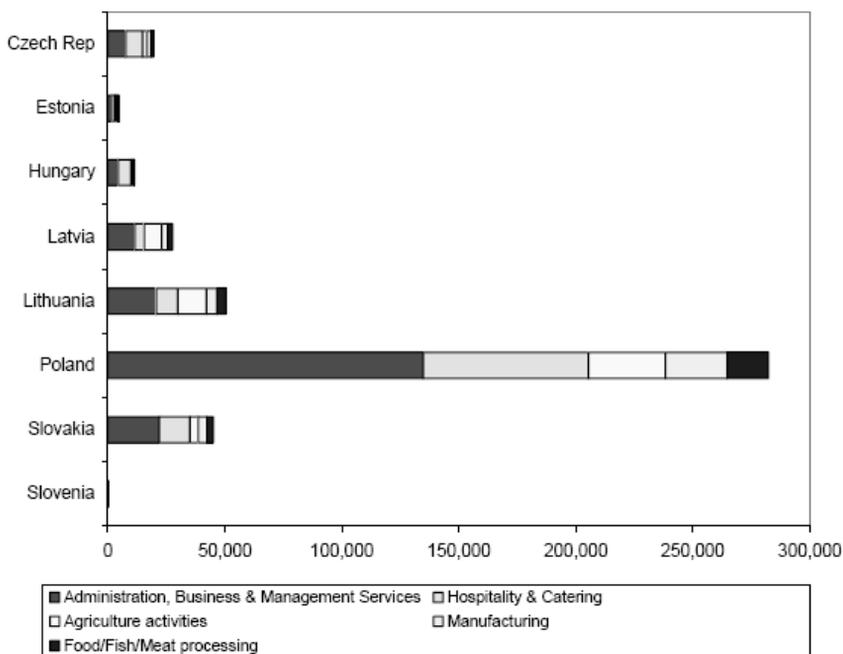
<sup>8</sup> BLANCHFLOWER D., SALEHEEN J., SHADFORTH C.: *op. cit.*, p.24.

<sup>9</sup> *Ibidem*, p.25.

Regarding the impact of the flow of A8 migrant workers on UK public finances, a recent study by PricewaterhouseCoopers (PwC) showed that the public finances did not suffer. As most migrants are aged between 18 and 34 years, with high employment rates compared with their UK equivalents, benefit payments are low. Younger workers have also fewer dependents and so are unlikely to be an additional burden on public services. PwC underlined, however, that the extra pressure on transport and housing might offset the benefits from the inflow of A8 migrant workers, and this should be taken into account in future government spending reviews<sup>10</sup>.

## Poles in the UK

As already mentioned, in the period between 1 May 2004 and 31 December 2006, the highest proportion of applicants registered with the Worker Registration Scheme were Polish (65% of the total).



Source: *Accession Monitoring Report May 2004 – December 2006*. Home Office, Department for Work and Pensions, HM Revenues & Customs, Communities and Local Government, 2007, p. 22.

**Figure 4.** *Top 5 Occupation groups – Nationality of registered workers. Cumulative total, May 2004 – December 2006.*

<sup>10</sup> BALAKRISHNAN A.: *Migrants have lifted economy, says study*. “The Guardian”, 27 February 2007. [Online:] <http://business.guardian.co.uk/print/0,,329728310-108725,00.html>.

Polish workers made up the largest proportion in every occupation group, with 66% in Administration, Business & Management (including employment agencies) and 64% in Hospitality & Catering (figure 4).

There is no data available on the geographical location of Polish workers in the UK. It is expected that the distribution of workers is analogous to the geographical distribution of employers of registered workers. It seems that Scotland is particularly popular for Poles, and within Scotland – Inverness, the fast-growing capital of the Scottish Highlands<sup>11</sup>.

Poles in the UK are increasingly seen as not only employees but also consumers. Many banks have targeted Britain's many Poles with portable bank accounts and Polish-speaking branch staff. The Financial Times assumes that it will not be long before major media companies will start ex-pat newspapers and TV stations<sup>12</sup>.

However, not all Poles have succeeded in the UK. British media from time to time report on problems involving migrant workers, e.g. recently there have been articles about rising homelessness among Polish migrants (and other Eastern European workers), hundreds or even thousands of Poles working on the black market and people-trafficking gangs<sup>13</sup>.

The British Embassy in Warsaw has been actively supporting all initiatives aimed at preparing Poles as best as possible for work in the UK. Before Poland's accession to the EU, the Embassy ran an information campaign on workers' rights in the UK labour market and on labour market regulations. The Embassy also provided guidance related to life and work in the British Isles.

In general, according to a BBC survey of Polish residents, Poles who have arrived in the UK are by and large happy to be there; as many as two-thirds are even happier in the UK than in Poland<sup>14</sup>.

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<sup>11</sup> BOLGER A.: *Poles home in on the Highlands*. "The Financial Times", 25 August 2006. [Online:] <http://search.ft.com/search?queryText=NATIONAL+NEWS%3A+Poles+home+in+on+the+Highlands&taje=true&dse=&dsz=&x=13&y=8>.

<sup>12</sup> ROBERTS D.: *Exploiting immigration*. "The Financial Times", 23 August 2006. [Online:] <http://search.ft.com/iab?queryText=Roberts%20Exploiting%20immigration%2023%20August%202006&cy=4&taje=true&x=3&id=060823000799&location=http%3A%2F%2Fsearch.ft.com%2FftArticle%3FqueryText%3DRoberts+Exploiting+immigration+23+August+2006%26y%3D4%26aje%3Dtrue%26x%3D3%26id%3D060823000799&referer=http%3A%2F%2Fsearch.ft.com%2Fsearch%3FqueryText%3DRoberts+Exploiting+immigration+23+August+2006>.

<sup>13</sup> LAVILLE S.: *Gangs use bogus Tesco jobs to lure young Poles to Britain*. "The Guardian", 5 February 2007. [Online:] <http://www.guardian.co.uk/immigration/story/0,,2006103,00.html>.

<sup>14</sup> DAVIS E.: *Happier in the UK than in Poland*. "BBC News". [Online:] <http://www.guardian.co.uk/immigration/story/0,,2006103,00.html>.

## **Contemporary migrations to Norway in the light of the most recent data**

A considerable increase in mobility between Poland and Norway has been observed since May 2004. It concerns both the settlement and work migrations. Over the last three years, more than 10,000 Poles have settled in Norway, and the number of Poles living there has doubled. Also the dynamics of the migration have changed. In 1990s, each year around 200-300 people settled in Norway. In 2005 the number grew to 3000 people and in 2006 to 7000. Similar dynamics were observed in the case of work migration.

Nowadays, four times more people than before Polish accession to the European Union have a valid work permit. Contemporary migration is shaped by a variety of factors, and this paper focuses on three main determinants of mobility: historical traditions, institutional conditions and economic factors.

The Polish Community in Norway has played a vital part in migration processes. Since its beginning in 1980s, they have enabled other Poles' arrival in Norway. Their help was also indirect as they provided information about living in a country whose culture differs considerably from that of Poland.

It may be presumed that access to the Norwegian labor market might have been restricted without the migration networks. Poland's entry into the European Union facilitated the legalization of work status. Norway does not belong to European Union structures, yet it has experienced a higher influx of immigrants than, for instance, bordering Sweden, which opened its labor market for foreign workforce.

One of the main causes of this situation might be the fact that Norway has accepted some regulations that are in effect in the European Union. One such regulation is the freedom of service that every year is exercised by more and more Poles. Also the importance of formal institutions, such as the active recruitment agencies, should be mentioned. In 2005 they sent 8,700 employees from Poland to work in Norway, while in 2006 the number increased and 12,000 found employment in Norway.

The most important factors that attract Polish migrants are the demand for foreign workers on the Norwegian labor market and the difference in the real pay rates

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between Poland and Norway. Additionally, the unfavorable situation on the Polish labor market (low pay, unemployment, bad working conditions) especially in the building and construction sector makes it sometimes easier for Poles to choose emigration (these are among the so-called push factors).

This analysis of the contemporary migration stream from Poland to Norway is based on statistical data from the last fifteen years and the results of the research “Polish Migrants in Oslo” (PMO) that was carried out in autumn 2006<sup>1</sup>.

## 1. Historical factors of the migration of Poles to Norway

Before analyzing the causes of the contemporary influx of Poles to Norway, it is good to look at the history of migration between the two countries.

The first recorded influx of Poles into Norway took place during World War II, when Poles were sent to Norway to perform forced labor constructing roads or airports. After the war, some of the laborers decided to stay in Norway and became the germ of the Polish Community there. According to Folketellingem and Norge<sup>2</sup>, at the end of 1970s Norway was not an attractive target place for migrants. This lack of attraction was visible in the decrease of the number of Polish residents there<sup>3</sup>.

The discovery of the oil and gas deposits along the coast of Norway suddenly turned the country into an economic power and marked it on the migration world map. However, up to the beginning of 1990s, Norway was the target country mainly for people seeking asylum or refugee status. At that time, employment migrations came mainly from other Scandinavian countries. The increase in the number of Polish migrants took place in the 1980s and was caused mainly by the influx of people politically victimized in Poland. During the time of political crisis in Poland, unionists and activists of Independent and Self-Governing Trade Union “Solidarność” and their families were granted refugee status or long-term permits to stay in Norway. This group of post-solidarity immigrants turned out to be of high importance in the Poles’ mobility in the 1990s. They created migration networks and made the arrival of other Poles easier. Poles supported others directly by sending invitations that were essential to getting a visa. They also help them after their arrival in Norway. Indirect help was

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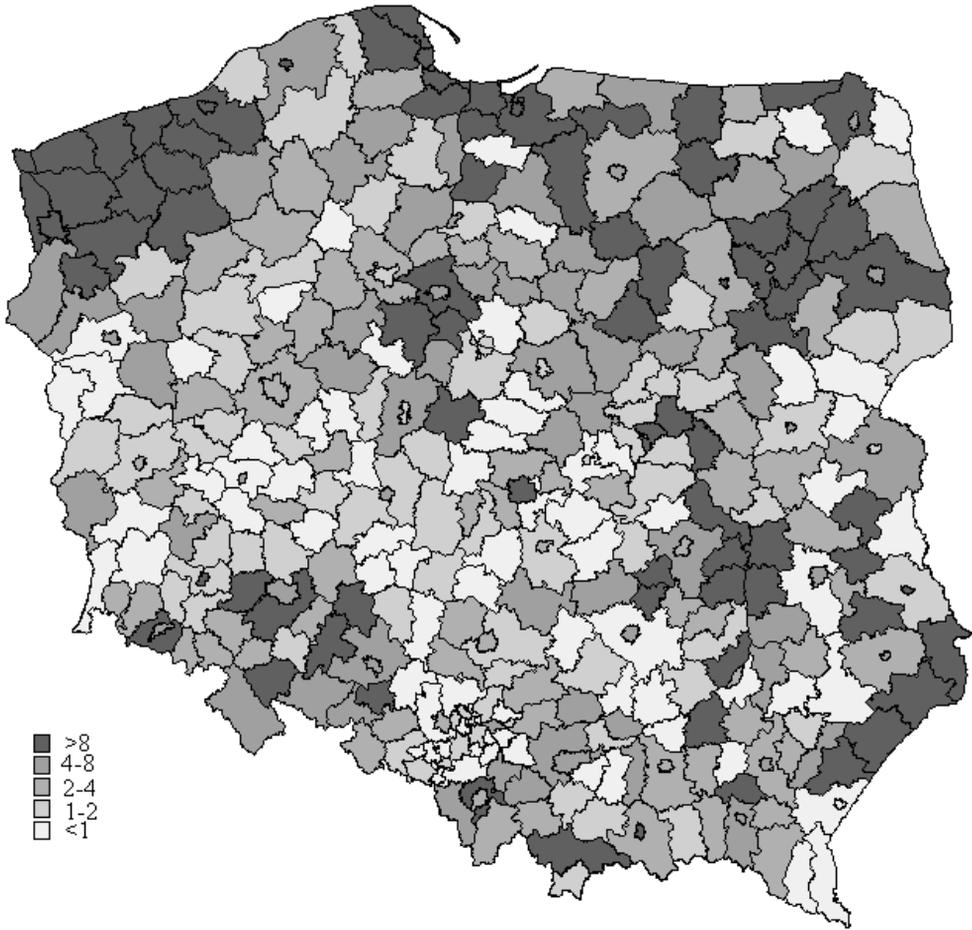
<sup>1</sup> Quantitative research “Polish Migrants in Oslo” (Polscy migranci w Oslo) was carried out in Oslo by two research institutions: FAFO and Center of Migration Studies at the Warsaw University. It used the methodology of Respondent Driven Sampling. 510 people took part in this research, 377 of whom were male.

<sup>2</sup> OLSZEWSKI E.: Poles in Norway. [In:] *Poles in Scandinavia*. Wydawnictwo Panta, Lublin 1997, p.256.

<sup>3</sup> According to the Norwegian Statistical Office (SSB), on 1 January 1970 there were in Norway only 1,165 people born in Poland.

also given, such as providing Poles with information about living and working conditions in Norway.

The influence of migration networks on the shape of migration waves is reflected in existence of regions with higher emigration rate than others.



Source: the authors, based on the Polish census of 2002.

**Figure 1.** *Intensity of departures to Norway in the years 1990-2001 per 1,000 people.*

The research conducted by PMO shows that one of the important factors that has shaped the migration stream to Norway has been the activity of recruitment agencies. The present mobility from regions in which there were no such migrations observed in the past might be caused by active agencies. A high percentage of people that did not belong to a migration network before they decided to move to Norway were recruited

by such agencies (38% of the respondents compared with 16% from the group with a migration network). What is more, other sources indicate<sup>4</sup> that in 2006 over 12,000 people started work in Norway thanks to the recruitment agencies. That figure represents 4000 more people than in 2005. Most of the people worked on ships as deck officers, pilots or other technical employees of navigation. The institutional recruitment and employment agencies have become more important, while the importance of migration networks as determinants of migration has declined. Agencies not only provide information about foreign labor markets, but they often also offer language courses and assist in finding accommodation.

## 2. Institutional determinants of migration

Polish accession to European Union structures became a turning point in the migration between Poland and Norway. In 2004, over 1,300 people, that is five times more than before, decided to settle in Norway. This dynamic can also be seen in subsequent years. In 2005 another 3,000 Poles decided to move to Norway, while in 2006 the number reached 7,000 people.

One of the main reasons for the increase is the fact that legal employment has become a lot easier to find in Norway. This oftentimes is decisive when a decision about migration is made. Although Poles need to have residence- and work permits, these do not seem to be a barrier in accessing the Norwegian labor market. This situation will remain unchanged through 2009. A permit is granted almost to everyone who receives a job offer that complies with Norwegian working conditions. There are also certain pay requirements to be met and Polish employees have to receive payment equal with that offered to Norwegians. In 2005, 38,525<sup>5</sup> such residence- and work permits were issued to Poles (half of them renewals). By May 2007, over 18,000 permits had been issued.

The majority of the permits were issued in the summer time. This indicates a continued seasonal element in migration from Poland to Norway. However, it must be emphasized, that since 1999 the number of people who have valid permits has been higher every month. It might be the result of a larger number of people coming to work but also the result of changes in the legal regulations.

Before 2004 a residence permit could be obtained only for a period of 3 to 6 months. Now it is possible to apply for a permit for a year or even for up to 5 years<sup>6</sup>.

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<sup>4</sup> The reports on the activity of recruitment agencies are published by the Ministry of Labor and Social Policy.

<sup>5</sup> These statistics are published by the Norwegian Directorate of Immigration (UDI) every six months on the website: [online:] [www.udi.no](http://www.udi.no).

<sup>6</sup> The expiry date of an issued permit depends on the employment agreement.

This regulation allows immigrants performing only seasonal work in agriculture to look for employment also in other sectors of the Norwegian economy and stay in Norway for the whole year.

Freedom of service became another factor which facilitated access to the Norwegian labor market and probably contributed to the increase in the number of Polish immigrants in Norway. Since Polish accession to European Union, the rule of freedom of service has been used more and more frequently by people who run their own businesses in their homeland. The scale of this phenomenon can be seen in the data provided by Central Office Foreign Tax Affairs (SFU) and the Ministry of Labor and Social Policy about the number of E101 forms issued to Poles.

Between January and August 2006 the Central Office Foreign Tax Affairs noted about 1,000 companies and about 7,600 employees from Poland that pay taxes for services provided in Norway. Polish statistics concerning the number of E101 forms issued in 2006 differ and state that around 7,900 people were providing services in Norway. However, since one person can obtain the E101 form many times, the data can only approximate the number of people that went to Norway to provide international services there.

**Table 1.** *The number of registered employees and business entities from Poland providing services in Norway*

Number	2003	2004	2005	01.01.-31.08.06
Employees	659	1,146	4,605	7,674
Business entities	18	243	584	931

Source: Central Office Foreign Tax Affairs (SFU), see: DØLVIK J.E., ELDRING L., FRIBERG J.H., KVINDE T., ASLESEN S., ØDEGÅRD A.M.: *Grenseløst arbeidsliv? Endringer i norske bedrifters arbeidskraftstrategier etter EU-utvidelsen*. „Fafo-rapport“ 2006, № 548, pp.61-62.

### **3. Economic determinants of Poles' migration to Norway in the light of statistical data**

Undoubtedly, the demand on the Norwegian labor market for foreign workers was one of the most important causes of the arrival of so many Polish immigrants. In the 1990s foreigners were mostly employed in the agricultural sector. There even appear anecdotal stories about Polish university professors working at picking strawberries during “scholarly” stays in Norway.

The opportunity to work in Norwegian agriculture was used by students who could obtain a visa without major difficulties. It is estimated, that in the years 1990-2000,

about 2,000 students applied for seasonal work permits in Norway every year<sup>7</sup>. At that time also people started engaging in illegal work in construction and renovation companies. Poles who entered Norway with tourist visas usually settled near Oslo. The capital was known among local residents for a cheap workforce. Poles were usually offered seasonal jobs and this usually made the stays quite short.

The contemporary dynamic of economic progress in Norway is caused by the country's investment and is reflected in the demand for workers<sup>8</sup>. The low unemployment rate and very high professional activity index in Norway (in the case of both men and women) must have caused growth in the demand of Norwegian employers for foreign employees.

According to the Confederation of Norwegian Enterprise, in the autumn of 2006, about 6.6 percent of companies grappled with an insufficient number of employees, while only 5 percent of them had indicated such problems six months before. In the period under investigation, in the sector of Information Technology and Communication the percentage of companies that reported problems with a lack of personnel doubled – up to 7 percent, while in the construction and building sector it reached 10 percent<sup>9</sup>.

The demand for foreign workers is noted also in the industrial and health care sectors. In May 2007 Norwegian labor market had over twice as many vacancies than it had at the end of 2004. The experts estimate<sup>10</sup> that in the next five years the largest number of jobs will be available to engineers and nurses<sup>11</sup>. In the future those differences will become even more visible, mainly due to the fact that the majority of Norwegians choose to study liberal arts while interest in technical and natural sciences declines. A similar situation can be found in most European countries.

It is claimed that another factor that influences the demand for foreign workers is the ageing of Norwegian society. According to estimates, by the 2060 the number of people of retirement age will rise by a factor of three, the number of people in pre-productive age will not change and the number of people in the economically productive age group will rise only slightly. This will result in a situation where the number of people in retirement age will be two times bigger than the number of people professionally active.

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<sup>7</sup> GODZIMIRSKI J. M.: *Tackling Welfare Gaps*. NUPI, Oslo 2005, p.110.

<sup>8</sup> Mainly in the building and construction sector.

<sup>9</sup> *Confederation of Norwegian Enterprise. NHO's Economic Report*. NHO Publishing House, Oslo, Autumn 2006, p.2.

<sup>10</sup> LINSKOG M.: *Labor market forecast and their use – Practices in the Scandinavian countries*. WZB 2004.

<sup>11</sup> An unsuccessful recruitment campaign is worth mentioning here. It was carried out among Polish nurses by the Norwegian Jobcentre (Aetat) in 2001. The organizer of the campaign hoped to employ 500 Poles to fill part of 7,000 vacancies. However, in the years 2000-2004 Polish nurses were issued only 190 work licenses.

Another economic reason for the observed migration movements between the countries are the earnings, especially the difference between the pay rates in Norway and Poland. For example, an unqualified construction worker who works the normal working hours (in Norway, 37,5 hours per week) earns monthly about 17,000 kroner gross (8,500 zlotys)<sup>12</sup>. In comparison, the average monthly wages in the building and construction sector in Poland were around 2,600 zlotys in the first quarter of 2007<sup>13</sup>.

Throughout the years, the differences between Poland and Norway in real pay were in the ratio of 1 to 3. This is one of the reasons why Norway still attracts Poles.

**Table 2. Average gross pay in the parity of purchasing power (PPP)**

	1998	1999	2001	2004	2005
All branches apart from agriculture, fishery and private farms that hire employees					
Poland	7 627,6	10 088,3	11 532,6	11 991,6	10 463
Norway	25 587,7	26 393,9	28 475,2	30 530,7	30 956,5
Building and construction sector					
Poland	7 676,4	9 899,2	10 494,8	10 785,1	8 870,3
Norway	24 088,2	24 886,5	26 482,1	28 163,9	28 660,5
Health care					
Poland	5 951,1	7 550,8	8 611,1	9 357,5	8 258,9
Norway	21 834,2	22 468,9	23 778,5	25 946,7	26 425,2

Source: Eurostat.

The research carried out by PMO shows that the main reason for migration was the pay rate. It did not depend on the respondents' situation a month before the departure to Norway. Migration networks became the second most important factor while the third was the demand for work. However, in the case of the groups of people that before migration were retired or pensioners, the main reason for migration to Norway was the demand for foreign work.

<sup>12</sup> Since January 2007 in the building and constructing sector there has existed a minimum hourly pay rate for an unqualified employee – 118 kroner, unqualified with a year of experience – 123 kroner, and for a qualified employee – 132,25 kroner.

<sup>13</sup> GUS. *Zatrudnienie i wynagrodzenia w gospodarce narodowej w I kwartale 2007 roku*. Wydawnictwo GUS, Warszawa 2007, p.46.

**Table 3.** *The main reasons for migration to Norway*

Reason for migration	Employed		Unemployed looking for work		Working abroad	Student	Pensioner/retired
	Full time	Part time	Active	passive			
Pay rates	69.2	54.3	45.8	38.2	73.5	47.2	16.7
Demand for work	1.2	2.9	10.8	0	5.9	11.1	66.7
Migration networks	20	22.8	33.7	55.9	14.7	33.3	16.7
Other	9.6	20	9.7	5.9	5.9	8.4	

Source: authors' research

Taking into consideration the above mentioned arguments, it may seem that the contemporary stream of migration from Poland to Norway is mainly the effect of the combination of two factors: high pay rates offered by the Norwegian employers and migration networks. Yet, the research conducted by PMO shows that there exists another factor contributing to the emigration of Polish employees, namely the bad situation on Polish labor market.

One of the obvious economic reasons behind the migration of Poles is the unemployment rate (in the third quarter of 2006 it was 13 percent<sup>14</sup>) which, despite the economic growth in Poland, remains high.

The existence of groups with high unemployment is caused by the structural character of unemployment. Those groups consist mainly of young people, among them graduates (for instance, in the third quarter of 2006 the unemployment rate among people under 24 was 28.1 percent), people with low qualifications (the unemployment rate among people with primary and middle school education in the third quarter of 2006 was 20.2 percent), people of pre-retirement age and women. The unemployment rate differs significantly in various regions. In the third quarter of 2006, in some provinces the rate was 6.7 percent, while in other districts it reached 30 percent.

For quite a long time, the highest unemployment rate has been recorded in northern and western Poland. It occurs mainly in the provinces of Zachodniopomorskie, Warmia-Masuria, Lubuskie and the western part of Dolnoslaskie.

Another problem of the Polish labor market is the apparent passivity of society. This is a result of the existence of a quite numerous group of people working in the "gray area" of the economy<sup>15</sup>. Research conducted by the Central Statistical Office in

<sup>14</sup> Data come from the period when PMO carried out the research (October – December 2006).

<sup>15</sup> Activity in the "gray area" includes hired labor without an employment agreement (without establishing the labor relation) or another agreement on performing a specific job (the employee does not come under social security, that means he does not have social security benefits and taxes are not paid) or sole-trader work, if there are no fiscal obligations realized.

1995, 1998, and 2004 revealed that over one million people (in 2004 they constituted 9.6 percent of all the people legally employed) worked in the informal sector. For over 800,000 people this informal employment was the main source of income<sup>16</sup>.

Workers in this informal labor market are burdened with high uncertainty. When given an alternative such as the possibility to leave for another country, they may be stimulated by this uncertainty to make the decision to migrate.

#### **4. Migration stream regulated by demand: the case study of Polish construction employees in Norway**

Nowadays in Norway, the demand for foreign work is seen mainly in the building and construction sector. About 10 percent of Norwegian companies from that sector report an insufficient number of employees. The findings of PMO confirm the fact that the migration stream from Poland is shaped by this demand. 94 percent of men questioned were employed in Norway as construction employees.

Let's focus on the situation of construction employees in Poland and the reasons for their migration to Norway. The construction sector in Poland is diverse, fragmented and territorially dispersed. It depends to a large extent on other spheres of the economy and is connected with them. Its present shape results from intense changes that have taken place in the Polish economy since 1989. Privatization turned out to be the most influential factor in the building and construction sector, and it resulted in a situation where the private sector represents 96 percent of all production<sup>17</sup>.

Thorough changes occurred faster in construction than in other sectors. Thus the construction sector was perceived by employees as highly insecure with adverse work conditions.

Before the system's transformation, construction workers were employed in state-owned companies and had indefinite employment agreements, which guaranteed them year-long employment and income, regardless of the season. With the switch to a market economy, the situation has changed completely. Nowadays, the construction sector is dominated by small companies (especially family businesses), and the employees are employed mainly just for the time needed to complete the task. What is more, they are either hired on fixed-term employment or are sole-traders.

Another frequent phenomenon in the construction sector is the employment in the gray sphere, which is very common in this sector and is caused by high labor costs and the sector's fragmented structure. Small companies, in order to protect themselves against recession, oftentimes try to reduce formal employment and employ people

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<sup>16</sup> GUS. *Praca nierejestrowana w Polsce w 2004 r.* Wydawnictwo GUS, Warszawa 2005.

<sup>17</sup> BOLKOWSKA Z.: *Aktualna sytuacja w budownictwie na tle dotychczasowych tendencji. Ekspertyza dla Kongresu Budownictwa Polskiego*, typescript duplicated.

off the books<sup>18</sup>, which means that a construction workers' position is quite insecure. Their work depends on economic conditions, flexibility of employment as well as the seasonal nature of the construction market.

Since the end of 2004, there has been observed a building and construction boom in Poland after a few years of economic depression. It caused dynamic growth in employment in the construction sector (it was higher by 8.7 percent in the first quarter of 2007 in comparison with the corresponding period of the previous year<sup>19</sup>) and a gradual growth in pay. Yet, the conditions in this sector are still adverse, and the pay rates are relatively low. According to the data of Central Statistical Office, the average monthly gross pay in the construction sector in the first quarter of 2007 was around 2,640 zlotys, which was 14 percent higher than a year before<sup>20</sup>. However, the actual pay in small construction companies, especially in some regions of Poland, is considerably lower: 1,200-1,500 zlotys gross<sup>21</sup>. To compare, the pay of unqualified employees in the construction sector in Western countries is, on average, four times higher than in Poland.<sup>22</sup>

The most obvious factor that attracts builders to Norway is higher pay rates. A minimum hourly pay rate in construction sector in Norway is 118 kroner, which is about 256 zlotys, a rate unattainable in Poland.

Despite the considerably higher costs of living in Norway, the earnings are satisfactory enough for Poles to persuade them to undertake employment migration to this country. However, not only wages make Norway such a popular country among Polish employees. The formal barriers to employment in Poland constitute another reason. Paradoxically, despite the insufficient workforce in Poland<sup>23</sup> there is a quite high unemployment rate among construction workers. It amounted to 159,000 people in the first quarter of 2007<sup>24</sup>. This situation is caused mainly by the lack of appropriate (also

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<sup>18</sup> BOLKOWSKA Z.: *Zatrudnienie, płace i koszty pracy w budownictwie. Analiza przedstawiona na konferencji „Aktualna sytuacja w zakresie zatrudnienia w budownictwie. Propozycje rozwiązań w oparciu o doświadczenia Unii Europejskiej, Warszawa, 4 grudnia 2006”*, typescript duplicated.

<sup>19</sup> It constituted the highest percentage growth in the economy and considerable increase in comparison with the previous years: growth of employment in the construction sector in the years 2005-2006 (in the first three quarters of both years) amounted to 2.6 percent. *GUS, Informacja o sytuacji społeczno-ekonomicznej województw*. Nr 3/2006, Warszawa, December 2006; *GUS, Informacja o sytuacji społeczno-ekonomicznej województw*. Nr 1/2007, Warszawa, June 2007.

<sup>20</sup> *GUS, Informacja o sytuacji społeczno-ekonomicznej województw*, Nr 1/2007, Warszawa, June 2007.

<sup>21</sup> Information from an interview conducted in the Regional Jobcentre in Wejherów (Pomorskie Province) in January 2007.

<sup>22</sup> BOLKOWSKA Z.: *Zatrudnienie, płace i koszty pracy w budownictwie*, op.cit.

<sup>23</sup> According to the research on economic situation conducted by the Central Statistical Office in July 2007, 58 percent of construction companies that hire at least 9 people claimed an insufficient number of qualified workers to be a barrier in running the firm. *GUS, Koniunktura Gospodarcza. Budownictwo*. Raport Nr 7/2007, Warszawa 2007.

<sup>24</sup> *GUS, Aktywność ekonomiczna ludności Polski. I kwartał 2007*. Warszawa 2007.

expected) experience and knowledge of advanced technology by employees (both in the case of fresh graduates and older workers who gave up their jobs during the recession), reluctance of employers to employ workers over 45, and low internal mobility (inter-regional) among Polish employees.

The employers of the Norwegian construction sector, as opposed to the majority of Polish employers, are willing to employ people with little or no proven experience (or without professional certificates) who can be trained. They also quite often employ people who are over 45. Besides, they offer high safety and comfort at work, and oftentimes they also provide accommodation. All these things result in the perception of Norway as almost a new promised land. Polish employees in the construction sector often choose Norway over other Western European countries. This is clearly visible in the case of builders that used to work in Germany. Almost half of the respondents used to work there. The high percentage of older workers – over 45 – in Norway proves that as well. Although, according to the research conducted by PMO, the average age of a builder was estimated as 41, in some areas a considerable influx of qualified workers of the so-called immobile age was observed. Many respondents from Silesia and Pomerania were 50 years old or even older (33 and 30 percent, representing 14 percent of respondents).

According to the workers that took part in the PMO research, Norway offers “good” earnings, the employers are fair and treat their employees in a humane way. The employees are not discriminated against because of their age, and this may be the explanation for the quite high influx of workers of the so-called immobile age. In Poland, they are oftentimes unemployed, not infrequently for a long time. Construction workers also emphasize the ease of finding a job in Norway.

Summing up the results of PMO research, the main push factors are low wages and the impossibility of finding permanent (a year or even longer) and legal employment, especially among people over 45. The adverse working conditions are also discouraging.

To recap, contemporary migration movements from Poland to Norway are determined mainly by economic, historical and institutional factors. In the 1990s, for instance, historical factors were decisive. Also migration networks enabled Poles to migrate to Norway. Of high significance are the economic factors as well as the demand for foreign work in agriculture. Yet, over the last three years, the main causes of migration were the institutional changes caused by the Polish accession to European Union structures as well as greater demand in the Norwegian economy for foreign workers, especially in the building sector. It cannot be denied, however, that migration networks are still important, although they are being gradually replaced by recruitment agencies. It is predicted that in the next few years the influx of Polish migrants will remain on the same level, especially because of the migration of families of people already residing in Norway in order to reunite with them.

## **Migration capital – expectations and experiences**

After Poland's accession to the European Union, the phenomenon of migration intensified greatly. Assessment of this phenomenon is very difficult because it is not easy to determine what value it has and with which losses it is connected. One has to analyze the expectations and plans connected with the decision about migration and the consequences of migration. Of which kind are they and who experiences them?

Regarding the expectations one can almost unanimously state that work-related migration has an economic origin: an objectively or relatively unfavorable material situation and a desire to improve it through taking up work abroad, or, widely speaking, a desire to increase one's capital. People going abroad assume that they will certainly find a job and that it will be a job offering significantly higher real income than their work in the home-country. One should not ignore the fact that going abroad is simultaneously connected with specific outlays; therefore it constitutes an investment. It also implies a prediction that this investment will be profitable either at the time of migration or in the future.

Taking up this thread I would like to direct attention to its three aspects: material (living), social and health. These analyses can be related either to the migrating individuals and their social base – family, local community and country as the widest plane of reference, or the country of background of the migrants and the receiving-country. The review will embrace only some of the elements in separate aspects.

### **1. Material migration capital**

Considering the “material” aspect of migration one should underline a few issues.

- Migration is a form of investment requiring some, not very precisely defined resources. Therefore the poorest, most marginalized individuals generally don't migrate. The material resources of the migrant often include the resources of family and friends (loans). These resources not only make the departure possible, but also give the migrant a greater possibility of independent choice of

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workplace and a longer period for looking for a reasonably satisfying job. They make the migrant to some extent independent from the necessity of taking up just any job in the receiving-country.

- The migrant aims to increase his resources through the income from work abroad. But simultaneously he collects other forms of capital – (new experiences, qualifications, language, education of children abroad or subsidizing the education in the home-country, new contacts with people), which in the longer perspective may be treated as an investment of an economic character.
- Incomes are partly purposed by the migrants for direct consumption in the receiving-country; therefore they contribute, in addition to the direct contribution of work, economic value to this country. At the same time, many migrants, especially among those who decided to go to work in conditions of economic compulsion, drastically limit the outlays for direct consumption in the receiving-country. A significant part of their incomes is allotted for the direct consumption of members of their families in their home-country.
- The most desirable investments according to the declarations of our migrants, buying a flat or building or renovating a house in the home-country, have the additional effect of increasing the value of the terrain on which they are placed and also improving its esthetics<sup>1</sup>.

Our team's research findings indicate that as a result of migration the basic expectations of work migrants are realized<sup>2</sup>. Many of them report that there has been an increase in the material capital of their families, either in the sphere of financial resources or in the sphere of improving the standard and equipment of the flat. Only some of the migrants have succeeded in making this improvement.

**Table 1.** *Assessment of material situation as the result of work abroad*

I believe that the situation:	Improves		Does not change		Worsens		I don't have an opinion	
	Significantly A bit				Significantly A bit			
	L	%	L	%	L	%	L	%
Financial, of the family	75	61,9	31	24,2	-	-	15	11,7
Flat equipment	55	47,0	34	29,1	5	4,3	23	19,7
Living, of the family	44	37,6	50	42,7	6		17	14,5

<sup>1</sup> ROMANISZYN K.: *Kulturowe implikacje międzynarodowych migracji*. Instytut Badań nad Polonią i Duszpasterstwem Polonijnym KUL, Lublin 2003. pp. 53-55.

<sup>2</sup> Studies carried out as a part of the international research project *MIGRAVALUE: Steering Economic and Social Cohesion in the CADSES Space: Valuing Migration as a Development Tool (Sterowanie wzrostem spójności ekonomiczno-społecznej w obszarze CADSES – waloryzacja migracji jako instrumentu rozwoju)*. This project is realized as a part of the Community Initiative INTER-REG IIIB CADSES, co-financed by the EFRR.

Generally one can state, that the material balance of the departure is positive, although the source of the increase of wealth of the migrants and their families is often a low-qualified job abroad whose wages don't fully satisfy the respondents. Two out of three respondents mention the lack of fit between the type of work done abroad with the migrant's qualifications and the fact that this work is below the level of their abilities (65,5%). Although many of our respondents are totally or at least partly (69%) satisfied with the wages received for their work, almost a fifth (19,5%) of the respondents stated the work that he/she does abroad is poorly paid and the wages are lower than expected.

## 2. Social capital

Social capital can be understood in many ways: as the intellectual, cultural or demographic capital (procreative potential) of individuals, but also of the whole country. Among the resources of social capital one can also count the network of ties (relations and distances) with other people. A specific kind of an individual's social capital is also his social position (professional, family) reached often as a result of great personal effort.

We should first underline some conclusions of a general nature.

1. Migrants have low social positions in the receiving-country; tolerance of periodic social degradation, mainly by working migrants, is equaled by their hope for promotion in the home-country.
2. Even the migrants that are recognized as highly qualified workers (for example doctors, nurses, specialists from other fields) rarely find an equal or higher position in the receiving-country than in the home-country. Generally, particularly in the early period, their position is sometimes secondary or supporting.
3. Saturated international flows favor treating migration like an object. This objectification is expressed by— among other things — human trafficking, work camps, smuggling of illegal emigrants through borders.<sup>3</sup>

### a) Changes in social relations of migrants

Let us look at the social relationships of the migrants through an analysis of the so-called "migration network".

Respondents' statements indicate that members of closer or further family as well as friends and neighbors already staying abroad are often a source of financial and organizational help, concerning either the departure itself or finding a job and place

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<sup>3</sup> ZAMOJSKI J. (ed.): *Imigranci i społeczeństwa przyjmujące. Migracje i społeczeństwo*. Lublin 2005, v. 5.

to live. Therefore, one should initially assume that migration, although making permanent contact with the family difficult, does not have to lead to its loss and even can tighten these relationships, either in the receiving-country or after coming back to the home-country.

However, according to the respondents, changes resulting from work migration occur most often in the area of emotions and relationships with the family. Respondents mention unfulfilled longings, feeling the absence of the family, lack of direct contact with children, and loneliness. These changes are not always noted or revealed in sociological studies. In the case of the question about the assessment of the character of changes in relationships, only some of the respondents mention that the changes happened at all, and positive assessments of these changes are more common than negative ones. Thus, one can assume that the period of migration and the spatial distance and separation may in many cases boost the value of the meaning of mutual relationships and feelings, but for some of the migrants, migration can be the reason for a relationship's worsening or loss.

*Table 2. Assessment of changes in relationships with family during the stay abroad*

I believe that the relations during this time:	Improved significantly/a bit	Worsened significantly/a bit
With children	18,2	1,8
With wife/husband	12,7	7,2
With parents	12,7	5,5

Respondents' statements indicate that during the stay abroad the relationships with family members, especially with children, mainly improved. A similar situation persists after coming back to the home-country. Then, changes in family relationships become more visible. The proportions of respondents indicating an improvement of relationships with family – compared with the period of the stay abroad – are higher.

*Table 3. Assessment of changes in relationships with family after coming back to the home-country*

I believe, that after coming back, the relationships:	Improved significantly/a bit	Worsened significantly/a bit
With children	23,6	1,8
With wife/husband	14,5	1,8
With parents	16,4	5,5
With partner	10,9	5,4

Although over half (55,6%) of current migrants state that their departure did not pose a threat to family permanence, more than one fifth (22,2%) assessed the changes in family as a significant or partial threat to its permanence.

To sum up, one can include a wider context of these changes, including transformations of organization and forms of family life. As other authors have pointed out, families of “two homes and two relationships” are established, in which one relationship is formal, in the home-country, and other, informal, abroad; the number of separations and divorces is growing; quasi-marriages are functioning, as well as concubinages and “weekend marriages”<sup>4</sup>.

## b) Change of social position

Migrants are ambivalent about their experiences in utilizing and increasing their intellectual capital and social position in form of professional promotion. On the one hand, assessments noting the enlargement of life perspectives predominate (51,2% to 30,8% who don't notice a change). Many mention increasing possibilities of education for children (28,3%). However, in the case of the question regarding whether the work done abroad gives one a professional promotion abroad and/or after coming back to the home-country, answers of the respondents are not optimistic. Most of the migrants don't see a perspective of professional promotion.

**Table 4.** *Assesment of professional promotion perspectives*

The work that I do:	Totally, partly		At all, under possibilities	
	L	%	L	%
Guarantees professional promotion after coming back to the home-country	29	22,7	85	66,4
Guarantees professional promotion abroad	22	17,1	91	62,1

Only every fifth respondent notes that the work abroad has a chance to be transformed into the future professional promotion in the home-country, but also allows the possibility of achieving a promotion in the migration-country.

Migrants more optimistically rate the “transmission” of work emigration into an improvement of their material situation than into professional promotion, including in the sense of moving upwards in the social hierarchy.

Cultural capital is social capital as well: a set of individual features, qualifications, gained skills based in the culture and the system of values of the home society. It plays an important role during the migration process.

The literature points out that cultural capital has a bearing on the success of migration<sup>5</sup>. Cultural capital includes individual features, such as ease of establishing contacts

<sup>4</sup> ROMANISZYNK.: *Kulturowe implikacje międzynarodowych migracji*. Lublin, Instytut Badań nad Polonią i Duszpasterstwem Polonijnym KUL, 2003, p.139.

<sup>5</sup> IGLICKA K. (red.): *Migracje powrotne Polaków. Powroty sukcesu czy rozczarowania*. Warszawa 2002, s.46.

and openness toward new information and models, but also the knowledge and basic norms of the receiving-country and qualifications appropriate for market needs.

Migration, life and work in another country widen the horizons and scale of experiences of a migrant, and therefore it adds to cultural capital. It has another effect: at least during the migration period, it causes the sense of a double cultural affiliation (identification), resulting from life in two cultural environments, life “here and there”.

### 3. Health as capital

If the emotional state and health were treated as a special value, a significant capital that is possessed by an individual, thanks to which he possesses chances, or which increases his chances for achieving widely understood life success, then we can ask, what happens with this value, with this capital, during the migration process and after coming back?

**Table 5.** *Changes of emotional state in respondents' assessment*

I believe that the situation	Improves		Does not change		Worsens		I don't have opinion	
	Significantly A bit				Significantly A bit			
	L	%	L	%	L	%	L	%
Emotional state of children	7	6,3	30	26,8	20	17,9	55	49,1
Emotional state of adults	7	6,1	51	44,7	37	32,4	19	16,7

The literature on the subject<sup>6</sup> and the results of our studies allow us draw a conclusion about the worsening of the emotional state in the population of migrants and their families. Stress, which is a consequence – on the one hand – of difficult separations, feelings of loneliness and longing, on the other – mainly in case of the migrant – an effect of adaptation process either in relation to life in the new, often unknown, foreign environment (including in the sense of values and moral norms) which is not always easy to accept, or in relation to experienced social degradation connected with change of the status, contributes to the worsening of the emotional state. One should add that the low material living standards of the migrants<sup>7</sup> also have an influence on health.

<sup>6</sup> RYAN A.M., GEE G.C., LAFLAMME D.F.: *The Association between self-reported discrimination, physical health and pressure: findings from African Americans, Black immigrants, and Latino immigrants in New Hampshire*. “Journal Health Care Poor Underserved” 2006, May, № 17 (2 suppl), pp. 116-132.

<sup>7</sup> DUNN J.R., DYCK I.: *Social determinants of health in Canada's immigrant population: results National Population Health Survey*. “Social Sciences Medicine” 2000, Dec, № 51 (11), pp. 1573-93.

Illnesses are some of the symptoms of adaptation of an organism to its surroundings, and illness is reaction of organism to stimuli with which an organism can't cope<sup>8</sup>.

*"If [human] feels a threat for ensuring his own basic needs, such as food, living place or there is a danger concerning not only his survival, but also his dignity, sense of value, liberty, possibility of realizing own plans, generally – his future – then he feels so-called stress"*<sup>9</sup>. It may be either the personal experience of a difficult situation and/or failures, or the consciousness of experiences through the family. Such types of experiences may be within the sphere of emotions: *"hidden despair, humiliation, liberty and hope taken, lack of acceptance, hidden anger and hate, masked depression /.../ caused by the illness"*<sup>10</sup>, but there are also feelings and experiences connected with relations with other people: lack of love, feelings of being rejected by close and important persons, loneliness, loss of a child or life partner through death or abandonment. Among the listed situations unfavorable for health *"one necessarily has to consider the fact that it (the illness) can begin from long-held negative perceptions of the world"*<sup>11</sup>.

The negative influence of stress on health has been confirmed through the years by numerous studies of patients and by experiments conducted on animals. Recently, different kinds of stress and its health consequences have been distinguished. *"Intensified, threatening stress causes the reaction of autonomic nervous system and hormonal response, which can have a huge influence on the cardio-vascular system, including producing sudden death."* On the other hand, a long period of loneliness and frustration *"influence mainly the immunological system and increase the susceptibility for infections and tumors"*, *"strong stress accelerates the ageing process"*<sup>12</sup>; feelings of rejection, loneliness or loss of a life partner lead to a significant shortening of the lifespan<sup>13</sup>.

In this perspective, migration is not a situation that is neutral for health.

Thus, we have additionally tried to check how migrants assess the condition of their health during their work abroad and after coming back to the home-country. In the analysis, one of the subjective indicators accepted by The World Health Organization in international studies was used – self-estimation of ailments. I present in the table only those ailments which, according to the respondents, particularly changed in relation to the migration. Particular changes should be noted in the category of psychosomatic ailments, strongly connected with the emotional sphere of human functioning.

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<sup>8</sup> *Wpływ berlińskich studiów doskonalących Władysława Biegańskiego na jego twórczość naukową.* „Wiadomości Lekarskie” 2007, № 60 (3-4), pp. 194-197.

<sup>9</sup> BRODZIAK A. et al.: *Współczesne rozumienie pojęć choroba i stan zdrowia.* „Annales Academie Medice. Silesiensis” 2006, v.60, № 3, p.250.

<sup>10</sup> Ibidem.

<sup>11</sup> Ibidem, p. 251.

<sup>12</sup> Ibidem, p. 251.

<sup>13</sup> MC FARLANE A.: *The contribution of epidemiology to the study of traumatic stress.* “Soc. Psych. Epidemiol” 2004, № 39, quoted for: BRODZIAK A. et al., p. 250.

**Table 6.** *Frequency of occurrence of the ailments in particular periods connected with work abroad*

Kind of ailment:	Before the departure	During the stay	After coming back
Psychosomatic ailments			
Fatigue	9,1	47,3	5,5
Nervousness	14,5	34,5	16,4
Irritation	18,2	40,0	10,9
Insomnia	9,1	18,2	7,3
Pain ailments			
Bones and muscle pains	5,5	30,9	5,5
Back pain	10,9	32,7	14,5
Stomach pains	3,6	7,3	7,3

Source: author's studies

One should also underline that, although the frequency of experiencing different ailments diminishes after coming back to the home-country, some of them remain at a level higher than they were before leaving the home-country (stomach pains, nervousness).

We can conclude that weakening of the health capital with which the migrants leave the home-country (coming back does not always rebuild this capital) is among the costs of migration.

## Conclusion

To sum up our analysis concerning migration capital, one can state that by making the decision concerning work migration independent of the whole context in a situation of economic compulsion (lack of job, necessity of increasing incomes, repayment of loans) or as the result of a “fashion for departures”, the potential migrants mainly plan an increase of material capital. And they usually achieve this goal, although not always to the level of their expectations.

Their social capital also undoubtedly increases, often independently from assumptions and predictions: higher level of language knowledge, learning a different culture and lifestyles, spending free time, forms of social contacts and general refinement, expanding consciousness of the “other world” beyond the local community. It may constitute a basis for promotion and for the increase of the migrant's and his family's life aspirations, and indirectly influence changes of social and professional position.

In both these cases – that of material capital and part of the social capital (cultural) – one can notice an added value.

There is also a second, less bright side to migration, which includes the family and health. Here we can often observe losses in these areas. It seems that in calculating the strategy of departure, the migrants are not conscious of and don't take into consideration the possibility of these losses. The range of these changes can exceed the profits achieved.

## Stress management strategies of migrant workers away from home

### Abstract

The following psychological stress theories form the theoretical basis for the article: Hugo's migration stress model<sup>1</sup>, stressful life events by Holmes and Rahe<sup>2</sup> and ways of coping with cognition stress by Lazarus and Folkman<sup>3</sup>, as well as Festinger's cognitive dissonance theory<sup>4</sup>. A literature review makes it apparent that people migrating for work experience considerable stress. Based on the literature we formulate a hypothesis that migrants experience migration stress with differing intensity. They also use different strategies for coping with the migration situation.

Qualitative studies based on 10 detailed interviews with Polish migrants presently living in Italy show how migrants abroad cope with migration stress.

We offer a preliminary typology of coping with stress, which follows Lazarus's model<sup>5</sup>. Cognitive efforts at modifying the secondary assessment of situations, which aim to lower the perceived strength of the stressor – wage-earning migration – are worth particular attention. These mechanisms are particularly strong in the case of persons that have not attained success. Subsequent strategies are related to searching for support and using different methods of coping with stress.

The globalization of the world economy has led to huge changes including on the labor market. One of these changes is the transboundary character of work, which involves the breaking down of borders between professions as well as between national labor markets<sup>6</sup>. This second aspect of the transboundary character of work may be observed in the flow of work migrants to EU countries.

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<sup>1</sup> HUGO G.: *Circular migration in Indonesia*. "Population and Development Review" 1982, № 1.

<sup>2</sup> HOLMES T. H., RAHE R. H.: *The social readjustment rating scale*. "Journal of Psychosomatic Research" 1967, № 11, pp.213-218.

<sup>3</sup> LAZARUS R. S., FOLKMAN S.: *Stress, appraisal and coping*. Springer-Verlag, New York 1984.

<sup>4</sup> FESTINGER L.: *Teoria dysonansu poznawczego*. PWN, Warszawa 2007.

<sup>5</sup> LAZARUS R. S., FOLKMAN S.: *Stress, ...*, op. cit.

<sup>6</sup> BAŃKA A.: *Psychologiczne doradztwo karier*. Stowarzyszenie Psychologia i Architektura, Poznań 2006.

Activity on the international labor market often carries with it the necessity to depart from home to work abroad. One can distinguish many typologies of migration<sup>7</sup>. One of the criteria for classifying migration is the goal of migration. Therefore with regard to the phenomenon of migration one can point to a psychologically interesting aspect of going abroad and working there<sup>8</sup>.

This phenomenon is called wage-earning migration and consists of staying in a country other than the home country, in connection with doing work there<sup>9</sup>. It concerns either work being done legally or work connected with breaking the law of the receiving country<sup>10</sup>. What is more, an important aspect of such migration is the fact, that incomes from working abroad are a significant source of financing households from which the migrants come<sup>11</sup> or they are allotted for the realization of important goals of the family in the home country. Thus, work migrants go abroad as family delegates or – in broader terms – society delegates – to earn and use money for the good of the communities that send them<sup>12</sup>. These rules constitute the psychological context of migration, in which, on the one hand, the subject feels obliged to complete the important task – collecting goods, and, on the other hand – lives in a foreign country, far from family<sup>13</sup>. Such a situation is linked with experiencing strong negative emotions resulting from the stressful nature of the migrant situation. Stress is defined in psychological literature in three ways: as a stimulus causing an adaptive reaction, as a process of inner reaction of the subject leading to adaptation to a changed situation in which the subject remains, or as a relation between stimulus and subject<sup>14</sup>. The most important aspect for this paper is the adaptation process. Going abroad to work represents a

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<sup>7</sup> JADŹWIŃSKA E., ŁUKOWSKI W., SOKÓLSKI M.: *Przyczyny i konsekwencje emigracji z Polski*. Warszawa 2001.

<sup>8</sup> GÓRNY A., KACZMARCZYK P.: *Uwarunkowania i mechanizmy migracji zarobkowych w świetle wybranych koncepcji teoretycznych*. "ISS UW Working Papers. Prace Migracyjne" 2003, № 49. Warszawa: ISS UW.

<sup>9</sup> UN (1998). *Recommendations on Statistics of International Migration*. New York: United Nations.

<sup>10</sup> OKÓLSKI M.: *Transformacja mobilności przestrzennej a nowe formy migracji międzynarodowych*. [In:] *Dziesięć lat po szoku. Polska gospodarka w latach 1989-1998*. Nowy Dziennik, Warszawa 1999.

<sup>11</sup> OKÓLSKI M.: *Mobilność przestrzenna z perspektywy koncepcji migracji niepełnej*. [In:] *Ludzie na huśtawce. Migracje między peryferiami Polski i Zachodu*. E.Jaźwińska, M.Okólski (Eds.), Scholar, Warszawa 2001.

<sup>12</sup> GUILMOTO C. Z., SANDRON F.: *The Internal Dynamics of Migration Networks in Developing Countries*. "Population: An English Selection" 2001, № 13(2), pp. 135-164.

<sup>13</sup> ROŻNOWSKI B., BRYK D.: *Stres migracji zarobkowej i jego konsekwencje dla systemu wartości migrantów*. [In:] *Migracja – Wyzwanie XXI wieku*, M.St. Zięba (ed.) (w druku).

<sup>14</sup> LIS-TURLEJSKA M.: *Specyfika następstw skrajnego stresu – historia poglądów*. [In:] *Jednostka i społeczeństwo. Perspektywa psychologiczna*, M.Lewicka, J.Grzelak (Eds.), Gdańskie Wydawnictwo Psychologiczne, Gdańsk 2002, pp. 267-286.

very big change in one's life situation. Referring to Holmes's and Rahe's theory<sup>15</sup>, one can point out that the changes caused by the departure reach a level of 400 points on their scale of stressful events, which doubles the risk of illness<sup>16</sup>.

Stress leads not only to the worsening of the mental or physical state or having health complaints – so-called somatization of the stress<sup>17</sup> – but also deep psychological changes can occur<sup>18</sup> as a consequence of its activity, or it can even cause disintegration in a human's values sphere, as prolonged, intense stress leads to crisis<sup>19</sup>.

Therefore it is important to examine two aspects of stress related to migration:

1. What is the source of stress for the earning migrants?
2. How do the earning migrants cope with the stress of migration?

Ad1.

There are two factors which are pointed to as the main determinants of an individual's reaction to stress: personality and environment. The literature showing the influence of personality factors is very rich (see Biela<sup>20</sup>, Banka<sup>21</sup>, Bańska<sup>22</sup>, Theorel and Karasek<sup>23</sup>). Some of the authors focus on the significance of having a "type-A personality", others underline the feature of personality linked to resistance to the signals of stress called hardness<sup>24</sup>, and some emphasize the generalized negative affect<sup>25</sup>. All of them share the conviction that some people experience less stress than others, even under the same conditions.

Another source of stress is the objective situation in which the subject lives. However, environment does not act directly on the subject, but acts through the senses. Thus, one should rather point to the influence of the perception of the situation in

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<sup>15</sup> HOLMES T.H., RAHE R.H.: *The social readjustment rating scale*. "Journal of Psychosomatic Research" 1967, №11, pp.213-218.

<sup>16</sup> ROŻNOWSKI B., BRYK D.: *Stres...*, op. cit.

<sup>17</sup> ŁAZOWSKI J. (ed.): *Problemy psychosomatyczne w chorobie wrzodowej żołądka i dwunastnicy*. PZWL, Warszawa 1985.

<sup>18</sup> LIS-TURLEJSKA M.: *Specyfika...*, op. cit.

<sup>19</sup> DĄBROWSKI K.: *Dezintegracja pozytywna*. PWN, Warszawa 1979.

<sup>20</sup> BIELA A.: *Stres decyzyjny w pracy zawodowej*. [In:] *Stres w pracy zawodowej*, A.Biela (ed.). RW KUL, Lublin 1990.

<sup>21</sup> BAŃKA, A.: *Psychologiczne doradztwo karier*. Stowarzyszenie Psychologia i Architektura, Poznań 2006.

<sup>22</sup> BAŃKA, A.: *Globalizacja pracy i kariery a proces identyfikacji społecznej i indywidualnej*. [In:] *Perspektywy psychologii pracy*, M.Górnik-Derose, B. Kozusznik (Eds.), Uniwersytet Śląski, Katowice 2007.

<sup>23</sup> THEOREL T., KARASEK R.A.: *Current issues related to psychosocial Job strain and cardiovascular disease research*. "Journal of Occupational Health Psychology" 1996, № 1, pp.9-26.

<sup>24</sup> KOBASA S.C.: *The hard personality: Toward a social psychology of stress and Health*. [In:] *Social Psychology of Health and Illness*, G.Anders, J.Suls (Eds.), Erlbaum, New York 1982.

<sup>25</sup> SCHULTZ D.P., SCHULTZ S.E.: *Psychologia a wyzwania dzisiejszej pracy*. PWN, Warszawa 2002.

which the subject finds itself. This issue was developed by Lazarus<sup>26</sup> as the part of his Cognitive Appraisal Theory. Psychological stress is equivalent to the specific interaction between a person and his surroundings, which endangers his well-being or overloads his resources<sup>27</sup>.

The basic element of the theory is the cognitive appraisal of the risk done by the subject. This process is called the primary appraisal. It is a conscious process of interpreting the information coming from one's surroundings. Appraisals may have values from "favorable-positive" through "without meaning" to "stressful". The primary appraisal determines the intensity and kind of emotional reaction: "favorable-positive" leads to emotional reactions with a positive sign, and "stressful" causes emotions with a negative sign. Authors of the theory count the following among the "stressful": harm and loss, threat and challenge. The situation of going abroad to work certainly fits these categories.

Assessment of a situation as "stressful" is most frequently related to situations posing very high demands. These demands may be appraised as simply exceeding the capabilities of an individual. Trying to escape and avoiding engaging such challenges is a natural tendency in this situation, and if avoidance is impossible, a stress reaction occurs.

Primary appraisals are not final. A subject may modify the appraisal of the situation during it, either under the influence of new information, or under the influence of a change in situation. This process is called redefinition and leads to a secondary cognitive appraisal. The secondary appraisal concerns not only the situation but also the possibilities open to an individual and his resources for coping with stress. The secondary appraisal, taking into consideration the possibility of controlling a threat, leads to stress reduction.

Albee presents a different model of crisis reaction, which can be also called a stress situation<sup>28 29</sup>. According to this author, the stronger the physical activity of a stressor and the perception of a stressor, the stronger the stress experienced. The ability to lower the intensity of the stress experienced is influenced by an individual's sense of his own value, the social support provided by significant persons and the individual's skills in coping with stress. On the one hand, this model lets us identify the sources of the stress, and on the other, it points to possible strategies for coping with stress.

Factors causing stress – stressors-- differ, depending on the situation, but most frequently one can attribute them to one of the three groups. According to Lazarus<sup>30</sup>, they

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<sup>26</sup> LAZARUS R.S.: *Psychological stress and the coping problems*. McGraw-Hill, New York 1966.

<sup>27</sup> LAZARUS R.S., FOLKMAN S.: *Stress, ..., op. cit.*

<sup>28</sup> BIELA A.: *Stres decyzyjny ...*, op. cit.

<sup>29</sup> ALBEE G.W.: A competency model must replace the defect model. [In:] *Readings in primary prevention of psychopathology*, G.W.Albee, J.M.Joff, L.D.Kelly (Eds.), University Press of New England, Hanover 1984.

<sup>30</sup> LAZARUS R.S.: Stress, coping, and illness. [In:] *Personality and Disease*, H.Friedman (Ed.), Wiley, New York 1990, pp. 97-120.

can be grouped into factors acting on physiological, psychological and social levels. Germani<sup>31</sup> in his sociological analysis of the migration phenomenon distinguishes three similar levels: an objective level (containing factors related to concrete localizations, for example, working or living conditions); a normative level (norms, rules and institutions connected with functioning in a particular social space) and a psychosocial level (where individual features responsible for a person's relationship to different options and his expectations play a central role).

Ad2. An individual, functioning under stress, is forced to take actions that will make it easier for him to function in the stressful situation. According to Winnubst<sup>32</sup> there are two strategies for coping with stress: using defense mechanisms and taking actions aimed at solving the stressful situation.

Lazarus and Folkman define the processes of coping with stress as "constantly changing cognitive and behavioral efforts aiming to get under control specific external and internal requirements, assessed by an individual as loading or exceeding its resources<sup>33</sup>". These activities take the form of behaviors fighting stress or defensive behaviors. Thus, one can underline that strategies for coping with stress will assume one of two directions – change of one's situation or change of perception of this situation without its objective change.

The subject can overestimate a situation in which it found itself, and instead of concentrating on the losses and threats it incurs, focus on the advantages that are possible to achieve. Such a way of thinking, based on overestimating, is one of the ways of coping with stress which makes it possible for humans to function normally; however, it is not the only way. It is also possible to make defensive reinterpretations of stress events, which leads to engaging the defense mechanisms, particularly rationalization<sup>34</sup>.

In light of this review of theories the following research question emerges: which specific environmental factors, related to work migration, do people perceive as the source of stress? A second research question concerns the ways of coping with stress: to what extent are they focused on changing the stress situation, and to what extent do they engage defense mechanisms? A further question, which seems to be particularly interesting from the psychological point of view, is to what extent these ways of coping with stress are constructive for the personality.

To answer these questions we have conducted research in Italy, with Poles staying there, most of whom work illegally. The study consisted of 10 in-depth interviews, in

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<sup>31</sup> GERMANI G.: Migration and acculturation. [In:] *Handbook for Social Research in Urban Areas*, P.M.Hauswer (Ed.). UNESCO, Ghent 1965.

<sup>32</sup> WINNUBST J.A.M.: Stress In organization. [In:] *Handbook of Work and Organizational Psychology*, P.J.D. Drenth, H. Thierry, P.J. Williams, C.J. De Wolf (Eds.), J. Willey and Sons, Chichester 1984.

<sup>33</sup> LAZARUS R.S., FOLKMAN S.: *Stress, . . .*, op. cit.

<sup>34</sup> JADŹWIŃSKA E., ŁUKOWSKI W., SOKÓLSKI M.: *Przyczyny i konsekwencje. . .*, op.cit.

which 8 women and 2 men took part. The average age of those studied was 36 years. They mostly came from small towns and villages; one person before departure lived in Warsaw. Before departure they had different occupations, ranging from an art historian who had been a worker at the Exhibition Centre of Łódź to housewives with no particular profession or employment. During their stay abroad they worked mainly as minders for elderly people or children and in construction and renovation work (men). The length of their stay in Italy ranged from 1.5 year (with breaks) to 16 years.

The situation of the Polish migrants working in Bologna whom we studied is very difficult and rich in stressful stimuli. Interviews reveal that these migrants experience very different difficulties which cause stress. These difficulties can be classed into following groups of factors<sup>35</sup>:

1. Factors on the physiological level:

- Bad living conditions: *“There is a bit too little food”; “It’s difficult for me, I am not young anymore and it’s difficult to learn the language. My lady, for whom I work (...) often talks in dialect which I can’t understand. Even Italians don’t understand this”; “One has to hold on, but it is difficult, difficult. We hold on, what else can we do?”* – the above opinions depict the difficult conditions, in which the Poles live and the sacrifices they make. The most numerous group among those studied were middle-aged or retirement-age women, who came to Italy without knowing the language and work as *badante*: *“They are mainly simple, uneducated people from Poland who come to Bologna. They are afraid of everything, of solving anything, of moving through big city, they don’t know the language”*. In this work it is characteristic that people live with the employer, usually an elderly, ailing person, of whom they have to take care, generally 24 hours per day. As a consequence they have to accept the offered living and dietary conditions. In practice, it often means working beyond their physical limits, undernourishment, and lack of contact with employer caused by the language barrier. This work leads to physical exhaustion and the occurrence of numerous physical ailments. These conditions are confirmed by questionnaire surveys of Polish migrants in Italy.
- Bad working conditions: *“I get up at 3:30, at 4:00 – I prepare vegetables for transport”; “I work all day, from 7 a.m. until 7 p.m. – I am out of home all day”; “It’s horrible exploitation. Italians terribly exploit foreigners. They cheat as they can”; “You are a slave here. I have got contract, which simply is a legalization of slavery”; “I feel unemployed. I am art historian and I can’t find anything with such education.” “The biggest difficulties in work are: bureaucracy, unfavorable treating of foreigners”; “They discriminated against*

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<sup>35</sup> LAZARUS R.S.: *Stress, ...*, op. cit.

*me from the beginning, and when I told them that I have completed artistic studies, they wrote that I have completed only the high school final exam”; “We often don’t say what education we have because then we are ashamed of the fact that we work in low occupations in Italy”* – migrants usually do work that Italians are unwilling to do. These are often physically exhausting activities, performed in difficult conditions, which do not offer possibilities of development and improving qualifications. Usually, migrants work below their level of qualifications, not in the occupation for which they have trained, and often illegally. These conditions not only deprive them of safety and stability, but also increase the stress experienced by the migrants. Many times, this exhausting work, below their level of qualifications is recognized by the migrants as humiliating, which has an effect on their self-esteem.

## 2. Factors on the psychological level:

- Loneliness: *“Poles are lonely here, as they are far from their families. Under this kind of emigration there are not whole families, like for example in Germany”* – those studied don’t directly mention perceived loneliness; however, this subject appears in their statements. The feeling of loneliness is deepened by the fact that although most of those studied live with their employers and spend most of the time with them, the migrants usually act as servants and employers do not let them go beyond this role. Moreover, separation from family members and difficult contact with them contribute to loneliness. Additional factors conditioning this state are language and cultural difficulties, which make establishing new contacts with Italians and keeping them impossible. Generally, having a social life is very difficult because of the lack of free time.
- Separation from the family: *“The family is missing me and I them. They phone me, because I can’t call from here”; “If my family is there and I am here, how can I feel good? (...) There is a kind of temporality, vagueness”; “The family suffers. It seems that if there was a contact once per year, I don’t know if I would have anything to go back for (...) later, there is no family. I can see that through my children, through my husband (...)”* – contact with family is often difficult because of financial reasons and limitations set by the employer. Migrants are frequently deprived of information concerning the life of their families, which means that they can not play their family roles. Such a situation frequently leads to numerous family and educational problems, weakening of ties, and emotional difficulties. Because of these concerns, the migrants, mainly women, often give up the possibility of legal work (with a contract), which would be connected with longer stay abroad, and at the same time with more severe consequences of separation from the family: *“Such a system of departures, every 3–4 months, is a system that causes a situation in which we*

*can't stand anymore without families.*" On the other hand, many of those studied regard going abroad as an escape from family problems and difficult situations in the home country: *"Coming here is always a desperation (...) Because my husband drinks, because I have debts and so on."* A change in the behavior of the migrants, who, separated from their social environment, commit acts that violate their norms or rules, is a frequent result of separation with family: *"When they are far away from each other, from the family, they behave like a dog that broke a chain."*

- Psychological overloads: *"They often accept contracts, in which they work 24 hours per day. It causes horrible stress – how long is it possible to be with one person, especially if one has no alternative?"; "I did everything here for 24 hours per day, with a sick person. It is not easy, because psychological problems occur. One begins to feel the burden of this person because one stays all the time with him/her"* – considering the kind of work abroad, which is frequently linked with numerous sacrifices and difficulties, including those of a psychological nature, there undoubtedly exists a situation of constant stress. It is even more significant because most of those studied really don't have, or don't notice, different possibilities for solving their own life difficulties, which were the main motive for going abroad for most respondents. The conditions often contribute to a state of inertia and passivity.

### 3. Factors on the social level:

- Social isolation: *"Italians treat us as an inferior kind"; "Italians are terrible. They treat us as inferior"; "Italians are not open. They don't invite us to their homes, they keep us at a distance"; "South of Rome, it is completely different country. The rules there are different"; "The situation of the Poles in the south of Italy looks much worse in every aspect"; "At the beginning it is a shock, when one comes here – it is a completely different culture"* – cultural differences are undoubtedly a significant stress factor, as well as lack of sufficient language knowledge; the character of work done (usually in the service fields) has a significant influence on the attitude of Italians towards foreigners. Historical conditions as well as the national mentality of Italians and their cultural dissimilarity to the migrants also contribute to the social isolation, which is often experienced by Polish migrants. Young people, who show greatest ability to fully integrate have relatively the best situation: *"Young people don't have complexes and come because they want to. They integrate fully, they speak Italian well. Young people feel good everywhere."*
- Bad treatment of the migrants – discrimination, marginalization: *"Italians have a poor attitude towards all foreigners"; "They have a strange attitude towards foreigners. From the start they interrupt them. As soon as we came here, everything became disturbing for our neighbors – that I receive too many phone*

*calls, that I walk through my flat, everything (...) Then, when Bulgarians moved in, I wasn't that bad, now they are the bad.*"; *"In the offices they sometimes made me understand that I am from the worst kind"*; *"Italians have a great need for somebody to serve them, and they employ Poles. These attitudes are probably left over from the monarchy"* – all of the above statements illustrate additional inconveniences with which Poles abroad contend. Depending on the country of stay and the prevailing attitude towards foreigners, the factor of discrimination is different. The studies conducted in Italy confirm that it is a significant stress factor, which has undoubted influence on the migrants' situation.

- Alienation, lack of support: *"Nobody takes care of us here. We have a bit twisted mentality, we need somebody to take care of us, and here – we have to cope alone"*; *"Poles don't maintain relationships with each other. Almost nobody comes to our meetings"*; *"They finish work and they are unable to organize anything"* – studies of Polish migrants in Italy reveal that it is a group which needs a great deal of support, either psychological or organizational. Thus, Polish organizations, such as the Polish consulate, work agencies and Polish Church play a significant role.

Individual elements of the external environment, so unfriendly for migrants, are seen by them as stressful stimuli. According to Lazarus's model<sup>36</sup> in the primary assessment of the situation, an individual first assesses stimuli coming from the external environment to determine whether they fit the following categories: harm/loss, threat, and challenge. If the stimulus is determined to fit one of these categories, which means that it is a stress factor, a secondary cognitive assessment follows. This assessment aims to determine the possibility of taking action to remove the causes of stress, or at least reduce its effects, and in case of the category of challenge – to attain available benefits. This assessment is being done in the situation of migration stress, as is illustrated by the statements of those studied. The most frequently mentioned reasons for going abroad are material difficulties, which makes it impossible for migrants to eliminate the reasons for the experienced stress. In this situation the secondary assessment aims only to reduce the effects of the stressful situation, often taking on a form of rationalization. As an example, one can use following statements of the migrants:

- *"I can afford to rent a flat, to go out somewhere. In Poland, if somebody earns 1000 zlotys, then it's not easy for him to support herself, and here – I earn 1000 euros and it is also enough for entertainment"* – this is the statement of Eve, a 35-year-old migrant, who assesses as a success the fact, that thanks to the work she does, she can rent a flat, although not on her own. She is a lonely person, having two jobs, and having almost no social life. Although her statements

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<sup>36</sup> LAZARUS R.S.: *Stress, ...*, op. cit.

underline the difficult conditions of the work she does – “I get up at 3:30, at 4:00 – I prepare vegetables for transport” – she still assesses her situation as positive, which is an example of valorization of her own life situation.

- “Food – it would be better if a person of my age did not eat too much. And by my employer one won’t become fat. It disturbs her that for example I eat a bread roll with jam for breakfast, because she eats in such way only when drinking coffee” – these are words of Genowefa (57 years old), who rationalizes in this way her living conditions. She does not directly describe her tragic situation, but she refers to it many times: “In the morning, when I make a sauce with carrot, I always hide this carrot. Then I eat this carrot additionally for the lunch, it remains long in my stomach. I don’t show it, because it would disturb grandmother and she would buy less.” The words of her friend, a migrant as well, help her in coping with own difficult life situation: “In the camps people had worse conditions, one eats little, but nobody beats me.”

Migrants try to cope with the effects of stress in many ways. Some look for support groups, searching for contacts among countrymen in similar situations or among Italians: “But there are also groups, some friends meet together, however these groups are closed. It’s more frequent to go out with Italians”; “I keep in touch with friend coming from Warsaw. Another Pole, who works close by, does not have time to keep in touch”; “Some prefer to keep apart from each other. There are such situations, but there are also people who keep in touch”; “Poles don’t have ties abroad. They don’t come to the meetings voluntarily.” The Catholic Church and other institutions serving migrants, for example, private job agencies, the Polish consulate, and labor unions, are helpful in establishing new contacts with other migrants: “Most of the people got to know each other in church”; “They come to the priest with faith problems or they want to ask for help in finding a job or they confide their problems”; “There are organizations helping foreigners, they are well-informed, they know the procedures (...) a Polish volunteer helping for free in the office of Italian Trade Unions (...) in Italian Trade Unions, I got information that helped me to solve the things.”

At the same time, all of those studied underlined the difficult situation of migrants who are working so hard and long, they practically don’t have time for maintaining any relationships. The reason for this situation, which is often listed, can also be attributed to the particular nature of Poles as a nation: “It results from their work, but also from the character of our nation. We are unable to unite, except in a situation of war”; “Poles maintain very poor contact with each other. It is often like that because they work a lot. Italians are horrible and they exploit foreigners.” The competition among migrants trying to find and retain employment in a foreign labor market for whose conditions they are not prepared works against the forming of informal groups: “Poles earn at the cost of each other – nobody will give work for free.” Another reason is a lack of funds;

people that have to limit their own food purchases are unable to use part of their funds for social meetings: *“I spend little, only for the necessary things, I can prepare coffee at home, I don’t want to waste even these 2 euros, because I know that later there will be shortages at home.”*

One way to try to cope with the loneliness universally felt by the migrants, the lack of close emotional relationships, and the feeling of being lost is to start informal relationships: *“People often start relationships with people, who are already in another relationship. They are easier to be hunted – they are far from home, without any support.”* Relationships often fail: *“Polish women have a tendency to establish relationships with Muslims. However, one has to take into account the fact, that it is a different culture and mentality and Polish women – quite independent from their nature – can’t be lucky with them. Also the marriages of Polish women with Italian men are often unhappy”; “Having a man from Italy is a failure”.* Although relationships are an attempt to cope with perceived loneliness and social alienation, they often compound the difficult situation of a migrant, instead of improving it. These migrants often get entangled in informal relationships with other persons, without any perspectives for the future. They experience disappointments, rejections, or are exploited. Additionally such entanglements contribute to a further weakening of ties with the family left in the home country and can even lead to divorces.

Among the ways of coping with stress, which have been observed among the migrants, the most drastic and destroying is alcohol abuse. As an example, one can quote following statements: *“One goes to the station or a park and drinks wine”; “Those older don’t want to integrate, they stayed closed in their own circle and they drink vodka. They meet also in the church, and they go to the consulate only if they really have to”; “People change here a lot, they are strange. Suddenly someone goes to a shop, buys wine and goes to the station to drink. To stay with somebody through 24 hours is a big stress and big burden, and people can’t resist that”; “There are many women that started to drink here”* – the choice of the place – station or a park – is linked to the probability of meeting other emigrants from Poland and therefore is connected with social gathering. A significant amount of alcohol abuse has been observed among Polish migrants in Italy. This is even more alarming because most of the migrants are female. Drinking alcohol is either a way of coping with stress, or eases integration with other migrants sharing a similar life situation.

Work migration is a growing phenomenon, which has assumed a mass character. It creates numerous psychological, social, and in further perspective – economic problems. Stress is one of the most serious problems to which people who decide to go abroad are exposed. Depending on the different factors and conditions creating the stressful situation and on psychological factors, there are different ways of coping with stress, observed among migrants.

## Final conclusions

Specific environmental factors, which migrants mention as reasons for their stress include: bad living and working conditions, loneliness, separation from family, psychological overload, social isolation, lack of support groups and discrimination. Analyzing the contents of the interviews, one can clearly notice that loneliness is a prominent complaint, but it is often mentioned indirectly, as alienation, feelings of misunderstanding, or living in social emptiness.

Usually it is the lack of time as well as the necessity of constantly earning that prevents migrants from maintaining contact with each other, but it is clear that even when the migrants have free time, they don't go to social gatherings. Also the cultural differences and attitudes of Italians towards migrants work against social integration.

Another important source of stress is work overload: migrants work very long days, often even up to 24 hours; they begin work in the very early morning hours. Such exhausting work needs regeneration of strength; however, migrants don't have time for this and frequently also don't have the strength to organize a rest. There is another stressor which is connected with the work done by migrants – in the literature it is called lack of control over the situation. Migrants mention in their statements the great uncertainty of their situation and its temporality. People working illegally don't have influence on the length of their own employment; they can't be also sure of receiving their salary, because there are often abuses from the employer's side.

The difficulties encountered during organizing the formal issues related to the stay and work are also a source of stress. These difficulties arise not only from formal causes, from requirements set by Italy, but also from the general attitude towards foreigners and the incompetence of office workers and the paralysis of the whole system designed to serve the migrants.

The data from the interviews show that there exists among many migrants a syndrome of behaviors of reactive adjustment to the situation. Migrants often submit themselves to fate and rarely take actions to cope with the situation. Their way of coping with stress lies rather in engaging the defense mechanisms. The most visible mechanism is rationalization: there is either the mechanism of "sour grapes" (that is overestimating of the negative aspects of alternative localization) or "sweet lemon" (valorization of the actual localization – receiving country).

Another technique of secondary assessment is the comparison of one's own difficulties to extreme situations, which makes the perceived stress seem smaller.

The phenomenon of using support groups as a way of reducing stress is very complicated in the case of Polish migrants in Italy. On the one hand, one can notice a strong motivation to meet with other Poles and to make efforts to establish such contacts, but it seems that their effectiveness is negligible. We observe the inability

of migrants to receive effective social support; they rarely manage to do this. Existing groups are not numerous and seem to be hermetic.

Difficulties with finding social support in order to reduce stress have many causes and are multifaceted. On the one hand, migrants do not have enough time and money to lead a social life; however, on the other hand, there are social barriers: social isolation, discrimination. Relations between Poles abroad are marked by distrust towards countrymen.

Simultaneously, one observes how easily migrants enter into informal relationships. Unable to find partners similar to themselves, migrants often decide to establish informal relationships with persons from completely different cultural circles or having different faiths. Such actions will probably lead to new stressful situations, resulting from a conflict in values, making this strategy unsuccessful, and even compounding the experienced stress. However, in the short term these relationships may reduce stress and make adaptation easier.

Seeking release through drinking alcohol is one of the extremely destructive ways of coping with stress observed among migrants. It leads to drunkenness. It takes on a form of regular weekly meetings, usually at a station. This place is significant because of the symbolic contact with the home country: it is the place where the buses and mini-buses from Poland arrive. This phenomenon is mentioned by all respondents.

Young people, who know the language when coming to Italy, cope better with experienced stress. Young migrants are more active and reduce their migration stress more often by changing own situation, for example, changing work for more attractive positions; they integrate better.

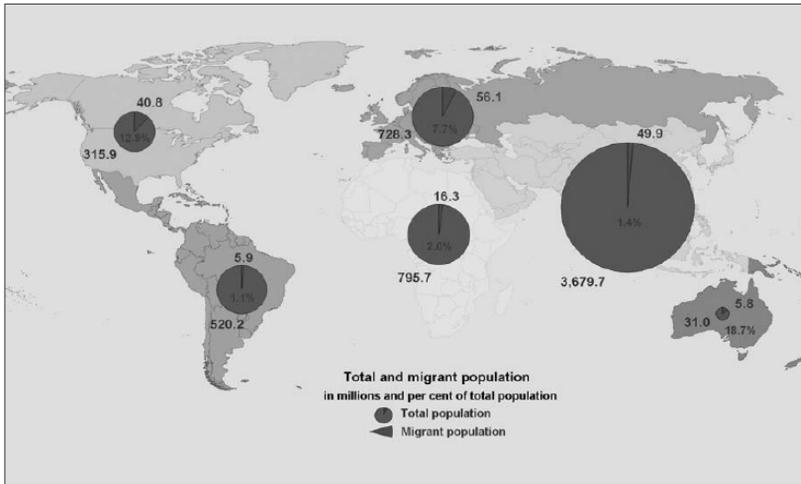
Fernando Fernández Martín\*

## Migration and EU in the XXI century

Migration is as old as the human race and as modern as technology. It is a phenomenon deeply rooted in human societies since the very beginning of their existence as well as one of the defining global issues of the early twenty-first century. In this sense, it is a human phenomenon par excellence which has always existed and will always exist. It has affected all countries and will continue to affect all countries, since all countries are countries of origin, transit or destination for migrants, and they may even fall into all three categories. Migration is therefore a complex phenomenon that involves many perspectives, from labour migration to family reunification and integration, as well as, combating irregular migration and human trafficking. Nonetheless, migration is not in itself a negative phenomenon. Migration is an essential and inevitable component of the economic and social life of every State and its proper management is a key element to develop its full potential whilst avoiding its inconveniences.

MAP 1

TOTAL AND MIGRANT POPULATION BY REGION, IN 2000



Source: United Nations, *Trends in Total Migrant Stock: the 2003 Revision*. Database maintained by the Population Division of the Department for Economic and Social Affairs, 2003. POP/DB/MIG/2003/1/Trends in total Migrant Stock by Sex, 1990-2000.

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As I said before, migration is also one of the priorities for political discussion in the twenty-first century. This is not fortuitous. In today's world one every five persons is a migrant (2.9% of the world's population under IOM's estimations), which means that about 192 million people are living outside their place of birth.

According to recent data supplied by the International Organisation for Migration (IOM), the USA (38.4 million) and the Russian Federation (12.1 million) are the countries at the top of the list of the 15 countries with the highest percentage of migrants. As we run down the list we find certain European countries such as Germany (10.1 million), France (6.5 million) and the United Kingdom (5.4 million). India (5.7 million) and Saudi Arabia (6.4 million) are also amongst the countries with the largest number of immigrants. Unlike in the past, no Latin American country is included amongst the major receivers of immigrants and this is the perfect example that corroborates the above. Latin America has turned from being a receiver continent (mainly European immigration) to being a region of emigrants. Its countries have been countries of destination and are now countries of origin.

*Table 1. Countries hosting the largest number of international migrants in 2005*

Country	International Migrations (millions)
United States	38.4
Russian Federation	12.1
Germany	10.1
Ukraine	6.8
France	6.5
Saudi Arabia	6.4
Canada	6.1
India	5.7
United Kingdom	5.4
Spain	4.8
Australia	4.1

If we analyse the percentages of migrants by region, Europe, Asia and North America are at the top of the list, with between 40 and 60 million migrants. Africa takes in 2% of the world's migrants whilst Latin America and the Caribbean account for only 1.1%.

From the above a first conclusion is that international migration is a phenomenon of major social and political significance.

It is true that the percentage is not outstanding, but we needn't to forget that presence and visibility in social, economic and political terms of migrants is very high, particularly given the uncounted share of irregular migrants.

But beyond the need to give an answer to irregular migration, about which we will talk later, it is in my view important to try to place this issue at the present world. As we know, migration has many contributory causes, nonetheless, we need to stress that Globalization – the growing integration of economies and societies around the world – has had a big impact with regards to migration flows. It has not only helped to increase the mobility of people around the world, but it has also contributed to the awareness by the public on this phenomenon.

As I said, globalisation has made people more mobile and made it easier for them to move around. International economic integration and liberalization of markets has permitted capital to move freely, which in practical terms has been positive. It has also made our frontiers more and more permeable rising the flows of people from country to country and enriching our societies to turn them into the melting pot we now know. Our cities and villages not only are benefiting themselves of the opportunities that a global market is offering them but they are also benefiting more from the enrichment migration represents.

On the other hand, there are certain aspects of globalization that need to be analyzed and treated individually due to their sensitivity and in order to avoid some risks that could appear. In this sense, Globalization has in some aspects created confusion and difficulty when people try to understand and adapt to it. The world in which we live has experienced an enormous change in very few years. The end of the cold war with the fall of the Berlin Wall has now given way to a time in which the world is perceived as unstable – increasingly so following the 11 September terrorist attacks. This instability is also perceived by some in cultural terms and translated into a certain fear of cultural dissolution which can in fact cause rejection to the opportunities globalization brings about. This is not only the case for destination societies. The fear of cultural dissolution is also perceived by migrants themselves.

To these tensions, these lack of understanding and difficulties to adapt by some parts of our populations we need to give a pedagogical answer. It is the duty of politicians to constantly prepare our societies to changes, in this case population changes, while taking into account the speed at which things change in a globalized world. A full comprehension of the issue of migration and the benefits it brings along, as well as a full awareness by migrant population on what the destination society is like, of its customs, is essential.

Nonetheless, globalisation is not the only factor which encourages migration. Further factors like international conflicts, war, poverty, corruption and a lack of sound government in the countries of origin have also encouraged the movement of people. The desire to improve the quality of life, the need to escape from difficulty and go in search of a better future increases when the difficulties in one's country of origin grow.

It is precisely the need to give a specific response to migration and taking into account the big variety of elements that cause it, the reason why we must try to define

the different forms of this phenomenon. In this sense, the International Organization for Migration gives us a definition of migrant, “*a person whose nationality does not coincide with his country of residence*”, encompassing three categories of people defined in general terms as:

1. Migrants in the strict sense as economic or work-seeking immigrants: people who aspire to a better life in a country of which they are not nationals and whose legal and administrative situation may be either regular or irregular.
2. Refugees are the best-defined category of people, since they are covered by international law and they enjoy protection under international agreements (in particular the Geneva Convention and other, secondary texts).
3. Thirdly, the number of people displaced internally on account of domestic armed conflicts in a growing number of countries has in recent years acquired major significance<sup>1</sup>.

Migration is a major contribution to countries of destination and origin.

Migration is, as I have said, a complex phenomenon which is regarded by all parties (and, naturally enough, by the European Union) as an essentially welcome phenomenon which creates both challenges and opportunities.

As I said, migration has profoundly altered western societies by infusing them with a variety of peoples and cultures. These days, Europe’s capital cities are multicultural mixed areas. This has helped to ensure that atavistic fears and prejudices vis-à-vis people who are different are now tackled from an enlightened point of view with the intention of framing the political responses which are needed if the structures of our society are to be brought into line with this new state of affairs.

Although prejudice and discrimination against immigrants and foreigners still exist, the idea of non-discrimination is fundamental to European integration and progress is undoubtedly being made towards recognising that even though other people may be different, they are nonetheless entitled to the same rights.

The Athens Declaration, which was adopted by the European Council at its informal meeting on 16 April 2003 (at which the Accession Treaty was signed), solemnly states that ‘*we shall respect the dignity and rights of third-country nationals living and working in the EU. The values we cherish are not reserved for our own nationals but apply to those who submit to the laws of our lands*’, whilst Article 15(3) of the EU Charter of Fundamental Rights states that ‘*nationals of third countries who are authorised to work in the territories of the Member States are entitled to working conditions equivalent to those of citizens of the Union*’.

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<sup>1</sup> The UNHCR (the body responsible for the second and third categories of people) states that, in 2002, it provided protection for 12 million refugees throughout the world and also looked after approximately 6 million internally displaced persons. In all, approximately 20 million people were under the UNHCR’s protection in January 2002.

And this, in my opinion, is the way things should be, since by means of the work they do and the taxes they pay, immigrants contribute, amongst other things, to the economic growth of a country and to its pension and unemployment-benefit schemes (the question of the future of pension schemes being a highly topical one).

But beyond the benefits that migration has brought to countries of destination we need to take into account the benefits it can have for the countries of origin. One of the developing countries' major sources of income is remittances from migrants working abroad. According to certain estimates the annual value of such remittances exceeds that of official development aid. In a country such as Morocco, remittances account for no less than 66% of total financial contributions and for 51% in the case of Egypt and Tunisia. In 2001, remittances provided 17% of Haiti's GDP. Another example is that of the remittances to India, China, and Mexico that have been estimated to amount to more than 50 billion €, compared to around 80 billion € in official development assistance worldwide.

Workers' remittances are in fact one of the largest sources of foreign financing, exceeding both official development assistance and foreign investment. For a number of developing countries, remittances beat merchandise exports as the prime foreign exchange earner and some 20 countries reported remittances equivalent to 10 percent of GDP or more.

The problem with such remittances is that, since the money comes from private sources and is sent informally, it is difficult to find any means of channelling it in a way which will do more to assist the development of the receiver countries. This issue was addressed at the Monterrey Conference on Financing for Development, in the course of which a call was issued for a reduction in the costs incurred by migrant workers when making such transfers and for development- (and, in particular, accommodation-) related opportunities to be created and investment to be made.

Just to give an example that concerns specifically my country, the remittances transferred from Spain to Latin America in 2006 have been estimated in more than 3.500 million euros. Of course this amount represents only a 6% of the total remittances received in the whole region during the same year, but nonetheless is more than the quantity the European Union devotes to the region (around 35000000 per year).

Therefore there is a special need to insure the transparency and easiness of such transfers while at the same time we make sure that the money can be invested in the countries of destination without to many burdens and administrative costs. This is a job that we have to do together, both destination countries and countries of origin.

But remittances are only one dimension of the phenomenon of migration from low-income countries. In particular, skilled migration has always been associated with concerns about brain drain. This would be a second course of action which may be of direct benefit to the developing countries would be to convert the 'brain drain' into a 'movement of brains' in both directions, so that the skills and the vocational experience

acquired in developed countries can be put to use in the countries of origin. A study carried out by a US foundation found that, in 1995, almost 47% of the foreign students with temporary visas who had completed doctorates in 1990 and 1991 were working in the USA.

In this area there is huge potential for joint action involving Europe and the regions of origin and steps are already being taken in order to tap that potential. I am referring to the crucial higher-education sector. As an example, the USA has overtaken Europe as the target country for Latin American university students, even though – paradoxically enough – Europe’s experience in the field of regional integration would be invaluable to the future of Latin America. For this reason the Madrid Summit adopted both the Alban scholarship programme and a 2002-2004 action plan designed to set up a common Euro-Latin America higher-education area, which is awaiting implementation. But beyond Latin America, the European Union is trying to make bigger efforts with regards to higher-education and has expanded its Erasmus program to every continent. *Erasmus Mundus* is since 2004 the EU co-operation and mobility programme in the field of higher education which promotes the European Union as a centre of excellence in learning around the world. That means that 230 million euros for 5 years, plus 66 million euros for student scholar ships for citizens coming from almost every country in the world.

Results achieved so far (December 2006):

- 80 selected Erasmus Mundus Masters Courses: wide variety of disciplines, from 23 countries represented the strongest participation France, Spain, Germany, UK and Italy.
- 2,300 grants awarded to incoming third country students: strongest participation China, India, Brazil and Russia.
- 400 grants awarded to incoming third country scholars: strongest participation USA, China, Brazil, Russia and India.
- 19 Partnerships: from 13 third countries strongest participation is from China, Brazil, USA, Australia and South-Africa.
- 23 attractiveness projects: 27 European and from 25 third countries represented the strongest participation in Europe are France, Spain, UK, Germany and Finland, and the strongest participation in third countries Russia, USA, Canada and Argentina.

This program intends not only to attract scholars to the Union, but to give an opportunity to third country’s scholars to learn and study in Europe which at the same time will have an impact in their countries of origin.

## The other side of the coin

There is no denying that it takes a certain amount of determination to regard migration as something essentially to be welcomed. But as I said before, such determination is even a requirement and we politicians are here in order to supply it.

In this sense the first message that we need to pass through is that Migration itself is not illegal. It is in fact necessary for the development of both source and destination countries. However, it may become illegal when individuals themselves or with the assistance of others attempt to enter countries clandestinely due to the fact that they may not enter or stay in a country legitimately.

The Europol Convention defines organised illegal migration as: “...*activities intended deliberately to facilitate, for financial gain, the entry into, residence or employment in the territory of the Member States of the European Union, contrary to the rules and conditions applicable in the Member States.*”

I was born – and I still live – in the region of Europe (the Canary Islands) which, on account of its geographical location, is well acquainted with the problems and the challenges thrown up by immigration. The number of illegal immigrants that have been detected by Spanish authorities to try to enter the European Union through the Canary Islands has been 18.858 in 2006. It might not seem a big deal to some, but if we take into account the ways in which they try to reach our coasts (“*cayucos*” and “*pateras*”) and that this does not take into account all illegal immigrants that have entered without being detected or through the rest of the coast line of Spain, one can realize that illegal immigration has a very big impact in Europe and specially in frontier regions. In addition, the channels along which migrants flow do not always lead to a happy end, in particular where illegal immigration is involved.

Europol estimates that around 500.000 persons enter the European Union illegally every year. Around half of this number is believed of having been assisted in some way by organised criminal groups. The involvement of organised criminal networks continues to rise along with the level of organisation exhibited by these groups. These organisations are increasingly becoming involved with the facilitation of illegal immigration, as it is a highly profitable business, earning up to 12 billion € worldwide every year, with, currently, little risk of detection or conviction. Also of concern are the increasing levels of violence and risk linked with organised illegal immigration.

### Número de inmigrantes irregulares que han llegado a las islas Canarias



Nº inmigrantes (1 enero-28 agosto 2006): **18.858**

Nº inmigrantes (1 enero-31 dic. 2005): 4.751

Clave:

-Isla: nº inmigrantes en 2006 nº inmigrantes en 2005

Fuente: Ministerio de Asuntos Exteriores [elmundo.es](http://elmundo.es)

Illegal immigrants use a wide variety of means to reach the EU. Many arrive via land, air or sea with forged passports or visas, or hidden in cargoes. Immigrants from Asia usually travel in small groups of five to ten. In a number of cases groups of up to 40 persons have been intercepted, camouflaged as “tourist groups”. Others reach countries near to their destination, where organized crime groups are ready to arrange their transport, which is usually both expensive and dangerous.

Of this we don't have to blame and shame illegal migrants whose only intention is to have a better life. Illegal immigrants are requested to pay sums of money which often result in large debts. A passage to the EU can cost between €3,500 and €11,250, with an average estimated at around €5,000. Not to mention that human trafficking and drug routes to the EU are roughly the same. Thus, criminal activities feed each other.

I think it is worth to mention the link between human trafficking (illegal immigration) and organized crime, not because I think that immigrants are criminals – they are desperate for a better life – but because I think it is important to underline that beneath the dramatic situation illegal immigrants face, there is always people ready to exploit their hopes and scarce resources. Both the fight against human trafficking and organized crime are therefore linked.

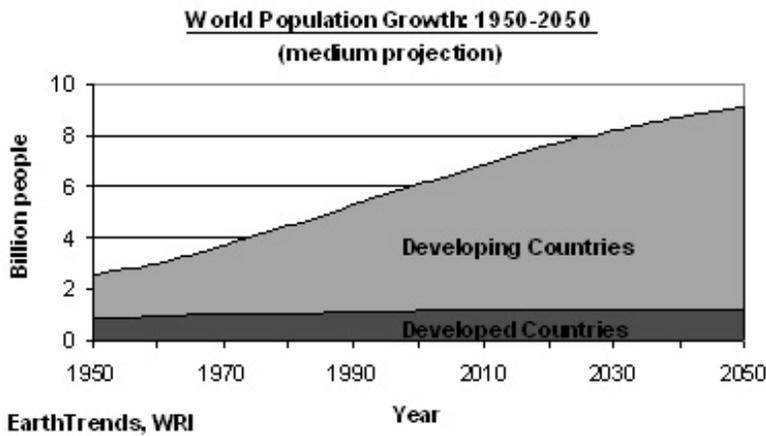
In this sense I believe that we are facing a major challenge, not only to avoid the risks to the lives of these immigrants but with regards to the perception our populations have of this issue and the negative perception that this can have in European societies. I also believe that the political earthquakes which shook Europe following some surprising election results in countries such as France and the Netherlands should

prompt us to take a pragmatic approach to the issue, rather than to cover up the serious problems with which we are confronted.

In the current international climate generated by the events of 11 September the shadow cast by the criminalisation of immigration has lengthened, since the linkage between migration and crime reflects a belief which is fairly well established in the lower strata of European society and a major effort combined with considerable political boldness will be required in order to sever this association of ideas.

In my view, this is the most important task we have to face and we need to do it fast. It is estimated that in 50 years the total world population will increase by 3000 millions people, which is increasing the total population to 9600 million people. But the forecast also tells us that for the most part the population will increase in Africa and Asia, mostly developing countries.

As a consequence, the need for water, food and land will be higher than ever before, having a special impact with regards to migration to developed countries and regions. We need to be prepared to face this major challenge.



Migration needs to be channelled and managed in a proper way, and in this effort we need to take into account not only migration flows but the impact it has and will have in our cities and regions, especially those facing major migratory stress.

## Migration and the EU

For all the above, the European Union has been trying to give an answer, sometimes with success sometimes with less success. In any case the figures always speak by themselves and the fact that Europe takes in the largest share of the world's migrants

(56 million people, according to the IOM's March 2003 figures), followed by North America (40 million) is essential to push forward a Common Migration Policy.

In any event, we in Europe must bear in mind that our various countries have followed differing historical and demographic paths. This fact, and the lack of synchrony in the historical periods of each of the Member States as regards immigration, must be taken into account when the common immigration policy (which I shall discuss later) is implemented.

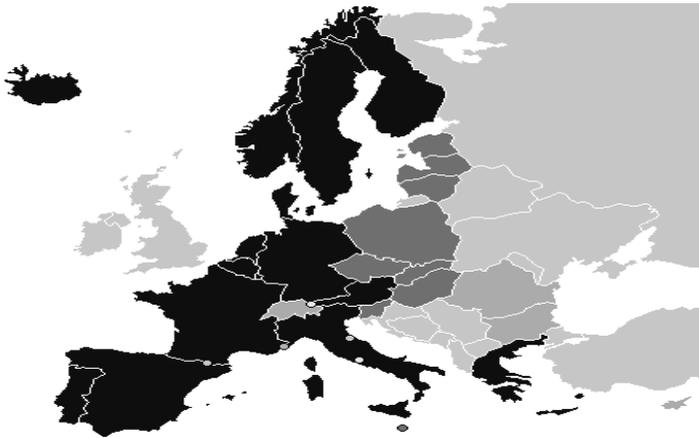
Just as the events of 11 September greatly speeded up the creation of an area of security, freedom and justice, I believe that the current situation calls for the speedy implementation of a common policy, i.e. for an analysis to be carried out and a joint response to be framed through coordination of the Member States' policies and exploitation of the Community legal framework's full potential.

The legal basis for an immigration policy is to be found in Article 63 of the Amsterdam Treaty, whilst the political basis was laid down at the Tampere European Council and, more recently, at the Seville European Council. In future, and once the Intergovernmental Conference completes its work, the articles relating to the EU's immigration and asylum policy will form part of the Community's 'first pillar'.

But beyond the provisions of the Reform Treaty, which are most important for the design and agreement upon a common migration policy, the principles by which that policy should be guided are in my view:

- The incorporation of immigration into the EU's external activities;
- From the point of view of internal policy, the rights of migrants resident within the EU to be guaranteed and the treatment of foreign workers and of asylum seekers to be harmonised.
- Action should fully take into account the causes of migration, with particular reference to the link between migration and development.
- Adequate financial resources to be allocated to the policy.

I shall dwell a little longer on the external dimension of this embryonic immigration policy and I shall begin with some considerations regarding the frontiers of the enlarged Union. Hitherto the EU has always focused its attention, where immigration is concerned, on the maritime frontiers of the peninsula countries in southern Europe. There is no need for me to mention the distressing images which we have all seen of inhuman odysseys across the Strait of Gibraltar, across the Adriatic and towards the coasts of the Canary Islands. With the last enlargement the EU has increased the size of its eastern land border, which means that the new Member States are required to modernise their legal, administrative, police, health and social apparatus in order to enable the EU's policy objectives to be achieved.



- Implementing countries
- Implementing through partnership with a signatory state
- Members implementing from 31 December 2007 (overland borders) and 29 March 2008 (seaports and airports)
- Members (not yet implemented)
- Expressed interest in joining

I know they are on the right track and soon the *Schengen agreement* will extend to some of these new members of not to all. But with regards to the external dimension of the EU's immigration policy on must bear in mind four aspects of the problem:

1. The main objective is to manage the flow of migrants by affirming the principle whereby responsibility is shared between the countries which export immigrants, those through which immigrants pass and those which take immigrants in. This leads us to shared flow management and hence to the requisite shared assumption of rights and duties by each country according to its abilities.
2. The Seville European Council was clear on this matter and it stipulated that future association and cooperation agreements concluded by the EU would include a clause on the fight against legal immigration and one on the readmission of nationals from the country in question and, where appropriate, of nationals from third countries. Migration management now forms an intrinsic part of the means by which the EU engages in action beyond its borders.
3. A key element in all of this will be the joint administration of the EU's external borders, through the new FRONTEX European agency that is slowly giving its first steps.
4. Not to forget the need to take into account the specific link between migration and development. Developing countries should receive Community aid in three forms: firstly, aid to be used specifically for the purpose of immigration management; secondly, aid in the form of aid and reconstruction programmes; and thirdly, long-term aid combined with a redirection of EU cooperation

policy towards tackling the underlying causes and the factors which trigger immigration, though still with due regard to the overriding purpose of EU cooperation policy, which is to reduce poverty.

All these four aspects need to be presented as a whole bearing in mind that the external dimension of the EU's migration policy, as I said, is a key element for the success of any such policy. Nonetheless, and even if some efforts have been made in this direction, the migration policy of the Union is still regarded as an internal policy. I hope that the new Reform Treaty will help us overcome the present difficulties, but one thing we will have to insist on is the fact that the new Vice-president of the Commission that will at the High Representative of the Union for Foreign Affairs and Security Policy is fully engaged in the process of elaborating and implementing the migration policy of the Union in its external dimension.

### **A solidarity framework programme of the European Union**

But as I said before, and in the light of the elements given, the European Union is moving forward.

Under the title '*Framework Programme on Solidarity and the Management of Migration Flows for the period 2007-2013*', the European Commission proposed three decisions of the Council and the European Parliament (subject to the co-decision procedure) and one Council decision (subject to the consultation procedure). The idea behind these proposals was to give greater coherence to the European Union's immigration policy, and to harmonise it. Ratification by all the Member States of the Treaty establishing a Constitution for the European Union would have made the institutions' task easier, but the legal instruments currently available to the European Union should be sufficient to allow us to make progress in this area.

The intention of the proposal is to increase solidarity among the Member States in managing and funding the costs engendered by receiving immigrants. Immigration is a priority for the European Union, as the Commission and Parliament have stated on several occasions. It should be stressed that the budgets of the four funds provided for under this package are not transferable among themselves. The Committee on Development of the European Parliament made sure to clarify this aspect in the debate on the financial perspectives that, in order to achieve this shared management objective. Nonetheless there has been a significant reduction of the budget as foreseen by the financial perspectives.

With regards to the European Refugee Fund (ERF), set up *inter alia* in response to calls by the European Parliament in 2000, it has been instrumental in laying the foundations of collective action by the Community for the reception of asylum-seekers and has also helped to provide for temporary protection in the event of a mass influx of displaced persons. Furthermore, the second phase of the ERF – 2005 to 2010 – has

just begun, taking into account the new Community regulatory framework on asylum policy. This being the case, the now approved instrument provides for an extension of this instrument until 2013, with the first multiannual tranche up to 2007 as provided for in the current regulation, and two further tranches – 2008-2010 and 2011-2013 – under the new framework programme.

Given that the burden of implementing the standards adopted in the European Union (e.g. the Schengen acquis) is currently shared unequally among the Member States, a solidarity mechanism is needed. It must also be borne in mind that the discussions on 'solidarity' should not simply be about the Member States, but that the concept of 'solidarity' should apply to all the countries involved, including third countries. This being the case, the rapporteur welcomes a deepening of the ongoing discussions on the benefits that development policy could bring to an effective migration policy. Events in recent months in the Spanish cities of Ceuta and Melilla have once again underscored a need that was already obvious: 'more development for less migration'. With this in mind, the Commission of Development has taken the view that a balance must be struck between security and solidarity with immigrants.

Since these are guidelines for the framework programmes for a whole financial perspective, the texts only outline parameters, the details of which will be filled in by multi-annual programmes. For this reason, these proposals do not lend themselves to detailed amendment; furthermore, the texts taken overall seem to take account of the discussions of the past few years. The concrete form that the proposals eventually take must be carefully monitored. Nonetheless, the rapporteur proposes giving greater importance to certain aspects of the Refugee Fund. Firstly, the link between refugees and development policy is to be included in the article on the general objectives of the proposal. Immigration policy has two dimensions – internal and external. It is therefore essential to lay down clear mechanisms to give an operational, coordinated character to the two dimensions. The rapporteur takes the view that regulated immigration provides a guarantee that immigrants' human rights and living and working conditions are respected. In any event, support for developing countries and full collaboration between the European Union and those countries are essential to the success of any immigration policy.

Within the different instruments of which we will speak in a short while one point is in my view of special relevance. Given the unceasing efforts to harmonise Community measures, we can consider it extremely modest to set aside only 7% of the budget for Community actions, particularly given that one of the calls made in the Hague is for the establishment of 'appropriate structures involving the national asylum services of the Member States with a view to facilitating practical and collaborative cooperation'. Likewise, it is not enough to put in place asylum procedures; guaranteed access to these procedures must also be ensured. In addition, a key element in the discussion was that of reinforcing respect for human rights.

The Framework program on solidarity and management of migration flows for the period 2007-2013 is a programme designed to improve management of migratory flows at EU level and to strengthen solidarity between Member States.

### Framework program on solidarity and management of migration flows

Total for the financial period 2007-2013: 4020,37 M€						
2007	2008	2009	2010	2011	2012	2013
291,37	371,00	449,00	495,00	610,00	786,00	1018,000

It has four dimensions.

The first concerns integrated management of external borders, with the setting up of an External Borders Fund.

External Borders Fund.						
Total for the financial period 2007-2013: 1,820 M€						
2007	2008	2009	2010	2011	2012	2013
170.000	170.000	186.000	208.000	254.000	350.000	482.000

The second concerns asylum policy, with the prolongation of the European Refugee Fund.

European Refugee Fund.						
Total for the financial period 2007-2013: 628 M€ + 71 M€ en 2007 = 699,37 M€						
2007	2008	2009	2010	2011	2012	2013
71.370	82.000	98.000	98.000	110.000	110.000	130.000

The third concerns the social, civic and cultural integration of third-country nationals, with the setting up of a European Integration Fund.

European Integration Fund.						
Total for the financial period 2007-2013: 825 M€						
2007	2008	2009	2010	2011	2012	2013
65.000	78.000	98.000	106.000	132.000	163.000	183.000

The fourth concerns the fight against illegal immigration and the return of third-country nationals residing illegally in the EU, with the setting up of a European Return Fund.

European Return Fund						
Total for the financial period 2007-2013: 676 M€						
2007	2008	2009	2010	2011	2012	2013
65.000	78.000	98.000	106.000	132.000	163.000	193.000

## Conclusions

As we have seen through this presentation, migration is a very complex issue. It is inherent to human society and its response has to be constantly adapted to the new forms and shapes migration takes. In this sense the most important in my view is to remain proactive. To find ways to develop and deepen the actions taken and to be afraid of changing them in the case they don't work.

The European Union is in a constant process of looking into this issue. We have seen it recently with the debate on the future of Europe, and the debate on enlargement. This constant process of "meditation" has been a key element to the success of the Union. Rethink what we have done and reshape to adapt to new circumstances.

I believe that the management of migration needs a multiplicity of instruments. The work of the European Union is not exhausted in the four instruments I have presented. Other actions need to further strengthen this policy area in order to succeed. It is not only a much needed increase of funds, but to widen the spectrum of those actions.

Cities and most affected regions need to start preparing for an increase of the migratory pressure that is to come. We need to be aware that they are the thermometer of this phenomenon. In this sense I encourage the Commission to open the spectrum and to strengthen the regional and local dimension in this area.

We need to reinforce and strengthen FRONTEX to make it a real effective agency and to control the fulfillment of the obligations by the European Member States and our partners.

And finally we need to insist in the necessity to really move forward with regards to the connection of development and migration and once and for all give coherence to the actions of the Union and of the Member States in that field. There is a need to go beyond a formal compromise to achieve the 0.7% of our national GDPs to development by 2010, but a real common strategy that targets in an efficient way the most eminent areas of action and of course the effectiveness of the instruments used and the actions taken.

*Zbigniew Zaleski \**

## **Migration in Europe – advantages and disadvantages**

### **1. Introduction**

Migration in search of a better life has been a feature of the Old Continent for more than a century. The poor but brave were leaving for both Americas, whereas Europe received incomers from Asia and Africa. At present, the European Union appears attractive enough to be the goal of often life-risking efforts to reach the continent. Is this migration a good thing? What can be done about it?

### **2. Europeans' displacements in Europe**

The enlargement of the EU from 15 to 27 members led to a major increase in people's going to other countries for a shorter or longer period of time. More and more migrants from the 12 "new" countries have good education and prove to be effective in finding positions in the labor force in Ireland and Britain and other economically stronger countries. At the same time they are regarded as a loss for the country of origin because the investment in their education brings no return. One may hear a migrant justify his or her actions by saying: "I stay within the EU..." From the Union perspective such movement can be productive, even if it causes problems in the labor market in the country of origin. For instance, there is a lack of good skilled workers in house construction in Poland and almost naturally workers from Ukraine are welcomed to fill the gap.

Another category of migrants are the citizens from outside of the EU, e.g. Sub-Saharan Africa via the Canary Islands, from Libya and Tunisia via Malta, and from Chechnya via Poland and Romania. Once they migrate to another country, they tend to stay after attaining permission from a host country, such as Spain. Before the "Shengen" border moved to the Bug River (between Poland and Ukraine), there was a fear that many immigrants from Asia would come over the eastern border. Now this fear is considerably decreased.

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What should be the EU's attitude towards these illegal comers? On the one hand, the illegal newcomers should be returned to their countries even when this process is costly. On the other hand, the aging population in Europe needs more people and the immigrants (even illegal) are a partial solution to this problem. Therefore, this dilemma is visible and needs a systemic approach.

### 3. Cultural aspects

The economic status of immigrants and host population creates some tension. Another and very crucial factor causing adaptation hurdles is the language barrier. The smaller the amount of physical labor that an immigrant has to perform, the easier s/he will adapt to the new culture. The more migrants fill positions such as salesperson or psychologist, the more crucial it is for the migrant to know the language. To give a hand in this matter, more language schools are being opened by the state and even more by the private sector, which makes the course hours convenient to immigrant-workers. This initiative and the initiative to found foreign language schools in countries of potential emigration deserve high consideration because they respond to the growing demand in education.

### 4. Winning vs. losing in the new culture

Depending on an immigrant's individual resources, such as her or his own capabilities and the challenges that the host country's presents, a newcomer has various strategies at her/his disposal in order to adapt to the new society. If we combine the binary attitudes (accept or reject) and incomer vs. host acting agents, we can speak of four possible outcomes of the process called by J. Berry **acculturation**<sup>1</sup>. In brief they are: 1) When the incomer preserves her/his own culture and accepts the host country's culture the result is adaptation; 2) when s/he preserves her/his own culture but refuses the host country's values, the result is isolation; 3) if one's own culture is negated and that of the host country is accepted, the result is assimilation; 4) and if one's own culture is negated and the host country's culture is also refused, then the individual experiences marginalization. It is rather obvious that the last strategy is the worst and the first the best (and the only acceptable one) for effective functioning in a new society.

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<sup>1</sup> BERRY J.: *Cross-cultural Psychology: Research and applications*. Cambridge University Press, Cambridge 1992.

## 5. European proposal

The variety of languages, social codes and norms of living standards in the EU are extremely visible. It is the Union's richness and handicap at the same time. Exchange of people, study and training, practices, and contacts should occur in order to facilitate adaptation and motivate the Union's authorities to pass directives and elaborate upon the programs for school and university students, for skilled workers and others. Information over the Internet, more professionalized manuals, and more ideas for learning languages are the appropriate coping strategies that result in further adaptation and higher well-being of immigrants. The benefits from these instruments are observed in well-developed bilingualism or the ability to live in two cultures (one of the parents and the one currently inhabited).

## 6. Final remarks

The movement of people across borders and across ethnic lines is a phenomenon that is increasing. In order for migrant's to gain from it on a personal as well as economic, social and political level, both parties, the society and the state, should invest in human capital through adequate education, information and familiarization with the other cultural system. There is no doubt that this is a costly challenge; however, it is a worthy investment. A recent report states that over the last years the EU has invested more in infrastructure and disproportionately less in human capital<sup>2</sup>. As an academic teacher and politician I will close this essay with a short proverb: *If you think the education is expensive then try ignorance.*

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<sup>2</sup> BACHTLER J.: *Improving the added value of EU cohesion policy*. Paper presented at the Conference on "A New Regional Policy: Innovative Ideas for the Post-2013 Reform European Parliament", 8 November 2007.

Bohdan Hud \*

## Main issues of labor migration in Ukraine

Ukraine's history has been marked by four or five huge emigration waves. A few of them were political in nature, namely, the migration that occurred between First and Second World Wars, the migration after the Second World War, and the forced migration in the early 1930s of the so-called *kulaks*, that is, the wealthy inhabitants of the villages. Over a million of them were sent from Ukraine to the North or Siberia.<sup>1</sup> The migration of the late 19<sup>th</sup> and the first half of 20<sup>th</sup> century was clearly labor migration. The main destinations were the North Caucasus, the Volga District, the Urals, the Far East, as well as South and North America. Many people suffered forced displacement and the loss of land, and in order to earn their living they transformed Siberian Taiga, American and Canadian prairies, and selvas and savannas in Brazil into fields and plantations. Such actions also contributed to the development of the regions.

Let's look at some figures indicating the intensity of the migration processes. At the end of 19<sup>th</sup> century 40,000 people left the eastern part of Ukraine (at that time it was a part of the Russian Empire) every year. At the beginning of the 20<sup>th</sup> century, the number grew to 200,000. There were also migration processes in the western part of Ukraine, which belonged to the Austro-Hungarian Empire. At the beginning of the 20<sup>th</sup> century, 350,000 people migrated to the USA, over 100,000 to Canada, and over 30,000 people to South America<sup>2</sup>. Most of them settled down and became a part of multinational communities of the USA, Canada, Russia and other countries. At the same time, at the beginning of the 20<sup>th</sup> century and in the interwar period, some of the labor migrants sent the money they earned by the sweat of their brow back to Ukraine in order to develop their farms. This phenomenon was mostly seen in Eastern Galicia.

In the years 1950-1980 labor migration from the then Republic of Ukraine (USSR) focused mainly on the south-east. Ukrainians worked the soil of Kazakhstan and the Russian North, Siberia, and the Far East. They worked on the so-called "communist" construction sites, and "Komsomolskiy" oil wells, coal and diamond mines, at the construction of main lines etc. The migration flow at that time was conditioned by two main factors. Many of the young professionals and workers (mainly graduates of

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<sup>1</sup> [Online:] <http://ukr-tur.narod.ru/geonas/naselukr/migration/migratukr.htm>.

<sup>2</sup> Ibidem.

universities and higher technical and professional education institutions) were sent by state agencies to distant regions of the Soviet Union which suffered labor force shortages. Some people chose to move there for higher pay and the ability to receive pension entitlements. They were also able to buy cars or get a state-owned flat without having to wait. Many of the Ukrainians settled in the country they worked; the rest of them returned to Ukraine and invested the money they had earned in the construction or purchase of flats, summer houses, cars, and necessities.

One of the special features of the “soviet period” was the fact that Ukrainian labor migration was of highly internal character, namely, people usually migrated within the boundaries of the Soviet Union, a very powerful country. People who lived in the Republic of Ukraine left for Russia, Kazakhstan and other Central Asian republics. The situation completely changed after the collapse of the Soviet Union. While the East (Russia) remained attractive for the migrant workers from Ukraine, from the middle of the 1990s more people decided to enter the new competitive labor market of the Western countries. The most recent migration wave of Ukrainians did not differ from earlier ones. Like the previous ones, it was economic in character since over 60% of the emigrants were of working age<sup>3</sup>.

Labor migration in the contemporary Ukraine is extensive, and therefore this article cannot discuss this phenomenon in detail. It, however, focuses on the main issues that are connected with migration. It touches upon:

- causes and scale of the most recent wave of Ukrainian labor migration
- main directions of the Ukrainian migration
- contribution of emigration workers to the economy of Ukraine.

## **1. The causes and the scale of the Ukrainian labor migration of the late 20<sup>th</sup> and early 21<sup>st</sup> centuries**

One of the main reasons for the mass labor migration of Ukrainian citizens was the economic crisis in the 1990s. The crisis was caused by the change in international and economic relations in the various spheres after the collapse of the Soviet Union. It was also caused by the lack of sweeping economic reforms which later on were called “a shock without therapy” (it was a phenomenon parallel to Polish “shock therapy” introduced by L. Balcerowicz). The huge decline in the gross domestic product (GDP) started in 1990 and lasted till 1999. In 1991, in comparison with the previous year, GDP of Ukraine was lower by 8.7%, in 1992 – by 9.9%, in 1993 – by 14.2%, in 1994 – by 22.9%, in 1995 – by 12.2% and in 1996 – by another 10%. Consequently, the real fall of GDP in 1999 compared to the GDP of 1990 measured 42.2%<sup>4</sup>.

<sup>3</sup> [Online:] <http://ukr-tur.narod.ru/geonas/naselukr/migration/migratukr.htm>.

<sup>4</sup> [Online:] <http://www.refine.org.ua/pageid-1306-1.html>.

The collapse of many businesses and the reduction of production by the ones that remained open caused an increase in the unemployment rate in Ukraine. It also caused lowering and worsening of living conditions (the unemployment rate in Ukraine was much higher than in Poland during the “shock therapy”). For many people such problems were new and quite unfamiliar. According to the methodology of the International Labor Organization (ILO), 1,5 million people in Ukraine were registered as unemployed in 1995. This number was rising every year and in 2001 it reached a peak of 2,5 million people which constituted 12% of the total number of people of working age<sup>5</sup>.

The number of the unemployed was much higher than the figure reported in the state statistics, and “hidden” unemployment became typical of Ukraine. The official unemployment rate in April 1996 was only 0.7% of the people able to work<sup>6</sup>. Yet, according to the professionals from the World Bank, the hidden unemployment rate that is constituted by the people who work part-time jobs and the people who were on forced unpaid leaves, amounted to around 35% of the total number of people able to work. According to the research conducted by the “Socis – Hellap” company in March 1996, 56% of people thought that the threat of mass unemployment was “very probable,” 29% stated that it was quite probable, while 52% of the respondents said that the probability of losing their job in the nearest future was quite high<sup>7</sup>. Today as throughout the years, Ukrainians have treated the risk of unemployment in the same way.

Fortunately, despite the profound socio-economic crisis, the social tensions did not give rise to serious conflict and this outcome was also typical of Ukraine. The Ukrainians were able to overcome the crisis by active economic migration. In the first years of independence, the migrations were usually internal. Millions of people with the so-called “suitcases” (a type of suitcase with wheels) were moving around Ukraine in search of goods that could be bought cheaper than in their home regions. Such practices enabled people to earn some money on the difference between the buying and selling prices. According to some researchers, Ukrainians chose not to leave their country because they, on the one hand, lacked experience in economic migration and, on the other, they hoped that the crisis would not last for long and that some market reforms would be introduced<sup>8</sup>.

From 1994 on, the number of people who left Ukraine has been higher than the number of people who came or returned to Ukraine. This emigration concerns mainly Crimean Tatars, Armenians, Germans, Greeks, and Bulgarians, who, in the postwar period, were the victims of the Stalinist regime. The exact number of people who left

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<sup>5</sup> [Online:] <http://uk.wikipedia.org/wiki/Безробіття>.

<sup>6</sup> According to Ukrainian law, only the people who are able to work and are looking for work are treated as unemployed.

<sup>7</sup> [Online:] <http://www.niss.gov.ua/book/1/10000016.HTM>.

<sup>8</sup> [Online:] <http://ukr-tur.narod.ru/geonas/naselukr/migration/migratukr.htm>.

Ukraine and remain outside its territory is still unknown. According to the plenipotentiary of the Supreme Council of Ukraine on human issues N. Karpachova, there are some factors that make it difficult to describe the scale of the migration problems. These are, for instance, the inefficiencies of the systems of statistical data concerning migration and the lack of a single body responsible for gathering such information, its compilation, and analyses. There is also no realization of the functions regulating this sphere. Thus the estimation of the number of Ukrainians working temporarily or permanently outside Ukraine in 1999-2000 ranged between 1,5 and 7 million people<sup>9</sup>.

According to A. Starodub, N. Karpachova in her speech at the Supreme Council of Ukraine in April 2003 did not give 7 million as the estimation of the number of Ukrainians outside Ukraine. This number was oftentimes presented as incredible in scientific studies and in the mass media. Yet, in a special brochure that contained Karpachova's speech, she stated that outside the territory of Ukraine, stayed "no fewer than 2 million labor migrants." Karpachova stated also that those numbers were understated since there are bases to claim that every year, depending on the season, no fewer than 5 million people who left Ukraine in search of better work and living conditions were staying outside the country. Karpachova, considering the fact that in the years 2003-2004 Ukraine had over 20 million people able to work, arrived at a conclusion that "at least every fifth economically active citizen of Ukraine stayed outside the country's territory for economic purposes"<sup>10</sup>.

The problem of Ukrainian economic migration was becoming more and more politicized in the years 2004-2007 due to the presidential and parliamentary elections. An example of a statement concerning this matter and having a highly populist character is the speech which Yulia Tymoshenko, the leader of BYT (БЮТ), gave during her electoral press conference in Ternopil in August 2007. Yulia Tymoshenko said then that about 3 – 4 million Ukrainians (especially from the area of western Ukraine) worked legally and illegally in Italy<sup>11</sup>. Data of the Ukraine Ministry of the Interior obtained from the Border Guard are more credible and state that around 3,323 million

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<sup>9</sup> [Online:] <http://cesus.org.ua/index.php?mm=2&dm=5&cid=14>.

<sup>10</sup> Approximately, such scale of the migration (around 3 million people) was suggested by the Minister of Labor and Social Policy M. Papijev during the parliamentary reading on issues connected with labor migration on November 17, 2004. (compare: *Українська трудова міграція до країн Європейського Союзу у дзеркалі соціології*. Київ 2005, pp.10-11); [online:] <http://uk.wikipedia.org/wiki/Безробіття>.

<sup>11</sup> Beyond a doubt, the leader of BYT referred to the hard life of Ukrainians and the necessity to create conditions to enable them to come back to Ukraine, in order to win favor of the voters. Mentioning the number of 3 -4 million emigrants in Italy from the Halych area was to shock the audience and to evoke the feeling that only BYT is concerned with such a huge problem of the region (<http://www.korrespondent.net/main/204208/>). It seems to be even more so, as according to the bilateral data provided by various international organizations, 120,000 to 700,000 Ukrainians live in Italy. [Online:] <http://www.korrespondent.net/main/210648/>.

Ukrainians live outside the country<sup>12</sup>. Prominent Ukrainian sociologists (S. Pyrozkov, O.Malynovska, and O.Khomra) doubt the authenticity of this number. They claim that the number of Ukrainian emigrants does not exceed 2 – 2,5 million people.<sup>13</sup> There are also no precise data concerning the number of people who had left and had not returned to Ukraine before 2003. According to the author of this article, the most probable figure is the number stated by the economist A. Hajducki who claims that nowadays about 4,93 million Ukrainians work abroad<sup>14</sup>. Other data state that there are about 7 million employees from Ukraine and only 2 million stay abroad permanently and they visit Ukraine once every 3 – 5 years. Most of the so-called *gastarbeiters* are seasonal workers who are usually employed for a period of 4 to 10 months<sup>15</sup>.

Although the data concerning Ukrainian migrants have discrepancies, the contemporary flow of Ukrainian emigration is quite large and should be of interest not only to sociologists but also to the government. It is not a unique phenomenon, but part of a global migration movement. Data indicate that between 150 and 175 million people (that is over 3 % of the world's population) live outside their mother countries<sup>16</sup>. Yet different data state that economic migration (more clearly emigration) from Ukraine constitutes 10 to 12 % of the total number of people of working age. It is also worth noting that around the world the acceptable migration percentage of working-age people is 3%. The level in Ukraine is much higher, making it a problem of national importance. Furthermore, in the future the problem of migration may become a real threat to the country's workforce and production potential. This problem is most important in the areas of construction and other works that are necessary to prepare for the UEFA Championship that is to be held in Ukraine in 2012.

## 2. The main directions of economic migration of Ukraine

In the first half of the 1990s the main labor market for workers from Ukraine was the Russian market. Despite the collapse of USSR, the Ukrainians continued to work there on the oil wells, in the mines in Siberia and in the North, and also in the trade and fishing fleets. In 1996, the Center "Social Monitoring" and the Scientific Research Institute of Ukraine on the issues of the young people conducted a sociological survey. They asked the question "Which country do you find the most attractive as far as the

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<sup>12</sup> The data concern only the period from 2003 to the August 2007. The number of Ukrainians who had left the country and remained abroad before 2003 is unknown. [Online:] [http:// job.ukr.net/news/2007/09/25/17036/](http://job.ukr.net/news/2007/09/25/17036/).

<sup>13</sup> *Українська трудова міграція ...*, op. cit., p.11.

<sup>14</sup> [Online:] <http://www.obozrevatel.com/news/2007/4/21/167088.htm>.

<sup>15</sup> [Online:] <http://www.newsru.ua/finance/230ct2007/zarobitchane.html>.

<sup>16</sup> [Online:] <http://cesus.org.ua/index.php?mm=2&dm=5&id=14>.

temporary work is concerned?” and they received the following answers: 25% of the respondents indicated Russia, 26 % – Germany, and 10 % – Poland<sup>17</sup>.

In recent years, the situation has completely changed. Russia has lost its importance and position among the wage earners. According to the research conducted by the sociological company “Socis – Hellap” (in January 1999), only 14 % of interviewed Ukrainians wanted a job in Russia<sup>18</sup>. One of the reasons for this change was the financial crisis in Russia in 1998. Intensive inspections of foreigners, especially in big cities, after V. Putin became the President of the Russian Federation, also contributed to Russia’s loss of attractiveness. Later, the situation improved and now Russia is again an attractive labor market for the Ukrainians. The demand for qualified labor force in Russia is one of the reasons for the country’s regaining its attractiveness. The experts claim that at least 1 million wage earners from Ukraine remain in Russia and they work, for instance, in Moscow, Saint Petersburg and around those cities at construction sites of flats and summer houses for the so-called “new” Russians. They also have seasonal jobs on farms and in the oil-gas fields in Siberia.

Together with the lessening importance of Russia as a labor market, it was observed that Ukrainians were becoming accustomed to the labor markets of its Western neighbors – Poland, the Czech Republic, Hungary and Slovakia. The lack of a visa regime and the rapid economic development in those countries contributed to their attraction. The number of people who left Ukraine for the West in the 1990s was so significant that it was even noticed by the representatives of Ukrainian politics. Unfortunately, those problems were used only for propaganda in the electoral campaign. One of the leaflets of V. Chornovil, a candidate in the Presidential election, contained the statement that “nowadays thousands of poor Ukrainians go to the Czech Republic hoping to find a better paid job there”<sup>19</sup>.

The scale of the migration of Ukrainians to the West (to the adjacent countries) did not change after the introduction of the visa regime which the European Union insisted on for Ukrainians, Russians and Belarusians, as research conducted in 2004 by O. Malynovska has shown<sup>20</sup>. The experts claim that nowadays at least 400,000

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<sup>17</sup> ШУЛЬГА Н.: *Великое переселение народов: репатрианты, беженцы, трудовые мигранты*, Киев 2002, p.259.

<sup>18</sup> Ibidem.

<sup>19</sup> See: WILSON A.: *Украї́нськ*. Warszawa 2002, p.183.

<sup>20</sup> See: МАЛИНОВСЬКА О.: *Украї́на, Європа, міграція: міграції населення України в умовах розширення ЄС*. Київ 2004, p.134. It seems that Slovakia was the only country in which, as a result of strict restrictions and border control for the citizens of Transcarpathia, the flow of Ukrainian wage earners have lessened. However, Slovakia very quickly faced problems caused by the lack of the cheap but qualified labor force. Interestingly, this problem was the subject of a conversation between the Presidents of Ukraine and Slovakia after which Slovakia made the visa regime for Ukraine more liberal.

Ukrainians work in the countries of the former socialist bloc<sup>21</sup>, yet this number is not very precise. First of all, it has to be emphasized that it has been changing quite systematically depending on the season. Next, there exist some premises that indicate that this number may be much bigger. Nearly 100,000 people have residence and work permits in the Czech Republic alone while other sources estimate that there are between 150,000 to 200,000 workers from Ukraine<sup>22</sup>. A similar situation can be observed in Poland. According to sociologist J. Konieczna from the Public Opinion Research Center (Warsaw), almost 250,000 citizens of Ukraine have worked in Poland at different times<sup>23</sup>. Professor H. Iglicka from the Warsaw Center for International Relations, however, claims that the number of Ukrainians may be as many as 500,000<sup>24</sup>. Yet, even though there are so many wage earners from Ukraine, they do not make Poland a preferred country for economic migrants. As the research of O. Malynowska shows, Poland ranks sixth on the list of attractive countries as far as job perspectives and the level of wages are concerned. Russia, Germany, Italy and Portugal rank higher. This situation causes some concern to Polish specialists who investigate migration processes and the benefits that migration brings to the “admitting” countries<sup>25</sup>.

In August 1990, Ukrainians started migrating into the countries of south and south-eastern Europe. Nowadays, as H. Iglicka emphasizes, they “do not only prefer this area of migration, but are present on that markets in large numbers and (in some regions) they replace people from Morocco, Algeria, Tunisia and Libya”<sup>26</sup>. There are at least a few reasons why Ukrainians entered the labor markets of the countries that became Member States of European Union in the second and third enlargements. The reasons can be divided into a few groups, namely into those of a legal, economic and psychological character. The mass flow of Ukrainians to Spain was conditioned by the factors that belong to the three groups:

- a) liberal Spanish legislation that allows foreigners to find a job without any special official documents;
- b) shortage of workers on the farms and in the construction sector;

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<sup>21</sup> See: ХОМРА О.: Сучасна українська трудова міграція: статус та можливості. [In: *Парламентські слухання „Стан та проблеми правового та соціального статусу української трудової міграції”*. Інформаційно-довідкові матеріали. Київ 2004, р.13.

<sup>22</sup> [Online:] <http://novasimya.org.ua/news/2007/09/19/11/>.

<sup>23</sup> КОНЕЧНА Й.: *Поляки-українці, Польща – Україна – парадокси стосунків між сусідами*. Київ 2003, р.16.

<sup>24</sup> ІГЛІЦЬКА К.: *Ринок праці для іноземців у Польщі*. [In:] *Міграція й ринки праці Польщі й України*, Варшава 2003, р. 46.

<sup>25</sup> MALYNOWSKA O.: *Trans-border Migration of the Population of the Ukrainian Western Frontier Areas in the Context of the EU Enlargement*. [In:] *Transnational Migration-Dilemmas*, K.Gmaj, K.Iglicka (Eds.). CSM, Warsaw 2006.

<sup>26</sup> [Online:] [http://www.csm.org.pl/images/rte/File/Raporty%20i%20publikacje/Raporty%20i%20analizy/2007/rap\\_i\\_an\\_0107.pdf](http://www.csm.org.pl/images/rte/File/Raporty%20i%20publikacje/Raporty%20i%20analizy/2007/rap_i_an_0107.pdf).

- c) much higher wages in comparison with the wages in Ukraine;
- d) possibility of being granted residence and work permits (registration certificates) as a result of seasonal legalizations of foreigners issued by the Spanish government;
- e) mass returns from Ukraine to Spain in the 1980s of the so-called “children of war,” who entered into marriages with the citizens of Ukraine and numerous family relationships in the motherland;
- f) possibility of simplified procedures when inviting distant relatives and friends from Ukraine to Spain.

Another important issue that influenced the migration of Ukrainians was the Spanish mentality that is close to Ukrainian. Some features of this mentality are, for instance, Spanish hospitality, kindness, favorable attitude combined with the respect for Ukrainian refugees, and lack of xenophobia<sup>27</sup>.

According to the experts, the fact that the European Union granted Spain financial aid for development of shipping infrastructure (construction of expressways and modern, quite technologically complex bridges) and upgrading the economy (opening of new companies, restructuring of the existing ones, etc) made it easier for Ukrainians to gain access to the Spanish market. Similarly, the financial support that was provided to Portugal through 2004 by the European Union created favorable conditions for the Ukrainians. The funds were allocated for constructing various facilities (mainly stadiums) for the UEFA Championship in 2004. Such investments allowed for the creation of hundreds of workplaces for people – mainly immigrants, including migrants from Ukraine. Ukrainians, in comparison with the representatives of other countries, are in the lead in terms of the number of work permits issued. 70% of the Ukrainians who applied for a job in Portugal have received a work permit<sup>28</sup>.

Therefore, the migration geography of Ukrainian employees has practically not changed over the last ten years. There were, however, some changes in the scale of the labor migration to respective countries, which is the number of people working abroad in different seasons and of those who settled outside Ukrainian territory. The most attractive labor markets for presenting the abilities of Ukrainians are the Russian market and the markets of the Member States of the European Union. According to the experts of the Ministry of Foreign Affairs of Ukraine, there are almost 1 million labor emigrants from Ukraine in Russia, over 300,000 in Poland, up to 200,000 in the Czech Republic, around 500,000 in Italy, up to 100,000 people in Spain and around 150,000 in Portugal<sup>29</sup>. In Greece over 17,000 Ukrainians have legal jobs, but the total number may be

<sup>27</sup> [Online:] <http://www.zlagoda.ru/article.php?id=1190>.

<sup>28</sup> СУСАК В.: Українські гостьові робітники та іммігранти в Португалії (1997 – 2002 рр.). [In:] *Україна в сучасному світі*. Конференція випускників програм наукового стажування у США, Ялта, 12 – 15 вересня 2002 р., Київ 2003, р. 201, 195.

<sup>29</sup> [Online:] <http://unian.net/ukr/comments/213652>.

as high as 50,000 people<sup>30</sup>. Yet, as was noted above, these numbers are not very precise and the actual figures may be twice as large as reported. What is more, the number of wage earners from Ukraine in various countries differs according to the season. Also the structure of the migration flow of people from various regions of the country has been changing. A few years ago people who left Ukraine for the Western countries were mainly representatives of the western regions. Nowadays many people from Central, South and East Ukraine can be met in the postcommunist countries of Central Europe and in South-Western Europe. What is more, citizens of the western area are present on the Russian labor market. Generally, 1 to 2 % of the wage earners from Ukraine are employed legally in Russia and the Member States of the European Union<sup>31</sup>. The rest of them work illegally which makes it quite hard to estimate their exact number.

### 3. The input of wage earners into Ukrainian economy

As far as the scale of investments made with the input of the wage earners is concerned, only some approximations can be made. This lack of precision is caused by two main factors. On the one hand, the data are too decentralized, and on the other, they are protected by bank confidentiality. What is more, a large share of the money from abroad is not sent to Ukraine through agencies such as *Western Union* or *Contact* but usually brought by couriers – friends or the scheduled buses drivers etc, sometimes sent by money orders or simply brought by the earners themselves. That is why the sociologists have to work with approximate numbers. The data (also approximate) are calculated from general number of wage earners, their assumed wages and the amounts of money that they are able to save and send to their families in Ukraine every month.

At the same time research conducted in various parts of Ukraine has allowed the scientists to evaluate the scale of the financial flow from abroad on the regional and national levels. The research carried out in the Ternopil region in 2001 pointed to the conclusion that economic migrants from the whole area sent about 100 million US dollars to Ukraine per annum<sup>32</sup>. This average amount is confirmed by the data on the total amount of the money orders sent from abroad to the neighboring region – Ivano-Frankivsk. In 2001 it amounted to about 56,5 million USD<sup>33</sup>. Even more surprising

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<sup>30</sup> ДОВЖУК Б.: ЄС – Україна та регіональні проблеми трудової міграції. [In:] *Разом в Європі: Регіональні стратегії формування економіки знань в умовах євроінтеграції*, І.Бакушевич, Т.Вєрнат. Тернопіль-Щецін 2006, р.318.

<sup>31</sup> Ibidem.

<sup>32</sup> *Українська трудова міграція...*, op. cit., p.19.

<sup>33</sup> See: Н.І.Карпачова, *Стан дотримання та захисту прав громадян України за кордоном: Спеціальна доповідь Уповноваженого з прав людини*. Київ 2003, р.33.

are the data obtained in the smallest region of Ukraine – Chernivtsi Region. In recent years, more than 60 million US dollars came in annually. Every year, wage earners from Bukovina invested over 720 million US dollars in the economy. It may be assumed that analogous inputs into the economy of the Lviv region are not smaller and may amount to 1 billion US dollars per annum<sup>34</sup>.

Although the sums appear unbelievably high, they are confirmed by the official data. According to the data provided by the National Bank of Ukraine, over 40 billion US dollars arrived in Ukraine in 2000 as money orders from individuals. Specialists claim that a considerable part of this amount constituted the money sent by the wage earners. It has to be stressed that this amount was six times bigger than the national budget of Ukraine at that time (6,8 billion USD)<sup>35</sup>. It should be also added that it was exactly after the year 2000 when the Ukraine witnessed a rapid growth in the prices of cars, real estate, etc. The increase of prices is still visible and the money earned abroad lies at the root of such increases. According to the data of International Fund for Agricultural Development (IFAD), Ukrainian migrants sent 8,4 billion US dollars to Ukraine in 2006 alone. In sending remittances they rank sixth in the world after the wage earners from India (24,5 billion US dollars), Mexico (24,2 billion US dollars), China (21 billion US dollars), the Philippines (14,6 billion US dollars) and Russia (13,7 billion US dollars). Yet, this amount is the sum of money that was sent through special bank systems and financial programs. According to A. Hajducki, the actual amount is much bigger and amounts to almost 21 billion US dollars which constitutes 25% of the Ukraine GDP and is almost as big as the amount of foreign investments throughout all the years of independence of our country, which on January 1, 2007 exceeded 21,1 billion US dollars<sup>36</sup>.

Unfortunately, most of these financial resources were not allocated for development of small and medium-sized companies, as was done in the countries of Central Western Europe. They were allocated for the construction and purchase of flats, furniture, cars, and necessities. They also covered the expenses of earners' children's education in certain universities and high schools and also the costs of summer or winter recreation. Emigrants' input into the Ukrainian economy is moderate and it is favorable to the increase in the foreign trade, development of services, and financial and didactic foundations of universities, etc. In this way, the country and the Ukrainian society achieve some dividends through taxes paid by the economic entities who receive the main part of income of the people employed abroad. Between 30 and 33% of the financial resources that arrive in Ukraine thanks to money orders and direct

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<sup>34</sup> [Online:] <http://unian.net/ukr/comments/213652>.

<sup>35</sup> Ibidem.

<sup>36</sup> [Online:] <http://www.newsru.ua/finance/230ct2007/zarobitchane.html>; <http://www.led.net.ua/ukr/news/149.html>.

deposits to the bank accounts of the citizens<sup>37</sup> goes directly into the system, especially into the banking sphere.

## Conclusion

The most recent wave of Ukrainian labor migration is quite a unique phenomenon in terms of its scale. The economic factors and especially financial aspects of this phenomenon are similar to analogous phenomena around the world. Beyond a doubt, the huge financial resources that are counted in dozens billions of US dollars per annum are conducive to the development of Ukraine and help to solve social and legal problems of some social strata in all regions of our country.

At the same time, 70% of the financial aid from Ukrainian migrants has a shady character. The fact that certain social groups have considerable amounts of money creates significant social disproportions and contributes to the high prices of real estate. The prices of apartments are beyond the wages in Ukraine. Moreover, such a huge emigration of labor force causes losses of about 10 billion US dollars every year in Ukraine<sup>38</sup>. The social costs of the mass migration are even higher. This is especially visible in the families where women are the wage earners. The children left without a mother's care very quickly start abusing drugs and alcohol. Another negative consequence of this phenomenon is social passivity and alcohol abuse among men etc.

The data presented above may lead to the conclusion that the issue of emigration is quite complex and immediate and that it requires solutions worked out at the national level. However, the main way of solving the problem is, undoubtedly, the introduction and implementation of well-ordered and consistent reforms that would be successful and would contribute to the quick development of the economy and a rise in incomes. At the same time, there is a need to create conditions conducive to the development of small and medium-sized companies so that the billions US dollars sent to Ukraine by the emigrants could be put to work for Ukraine and its citizens.

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<sup>37</sup> *Українська трудова міграція...*, op. cit., p.19.

<sup>38</sup> [Online:] <http://ukr-tur.narod.ru/geonas/naselukr/migration/migratukr.htm>.

*Nadiya Hapon\**

## **The Ukrainian family and work-related emigration: realities and perspectives**

### **Theoretical introduction**

The family is the most significant institution of socialisation. The establishment and self-realisation of a personality happens there. The family also performs such important functions as guardianship and care, socio-psychological protection and adaptation of the personality in crisis conditions. The modern Ukrainian family and its functions are characterised by conflicting tendencies, which influence the changes and development of relationships in the society as a whole and also the socio-cultural intentions of a young person. During the 20th century difficult, often destructive socio-political processes took place, which caused changes in the values of the Ukrainian family. The beginning of the 21st century was characterised by a strengthening of globalisation influences and migration processes, which noticeably transformed family values. Globalisation technologies present a new system of values of self-realisation of the personality, which has an impact on the traditional, spiritual-moral basis of the family. The time and energy spent on the use of new informational and telecommunication technologies is increasing, while the sphere of emotional and spiritual communication among the family members becomes narrower. Authentic family relationships become weakened by migration which leads to the functional existence of a young person and produces social hostility and loneliness.

Modern Ukrainian researchers study different aspects of the influence of social, political, economic and other factors on the migration of Ukrainian families. There is a need to analyse more completely the reasons for the work-related migration of Ukrainian family members in order to trace the ways of overcoming the negative consequences of migration. The chosen topic is of urgent importance. The aim of the research is to analyse the impact of socio-economic and socio-psychological factors on Ukrainian family members' migration and the ways of overcoming the crises which provoke it.

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Over the centuries basic family values, such as spirituality, accord, welfare, parenthood-motherhood and patriotism have been crystallizing in the national cultural self-consciousness. A historical excursus into the early and middle parts of the 20th century points to the socio-political reasons for the decay in family values, such as the destruction of its spiritual and religious basis by the Bolshevik regime; elimination of the economic basis of the family, i.e. private property; destruction of the family by famine, mass murder of “class enemies”, thus the increase in the number of homeless children and state “conveyerisation of upbringing”. In the second half of the 20th century the deformation of Ukrainian families’ basic values continued through such processes as atheism propagation and replacement of the national family traditions with the surrogates of the “soviet ritualism”. Youth migration was artificially created through the forming of a “rolling stone” psychology. The proletarianization of the family increased: urbanized families became completely dependent on the state. Family health deteriorated because of the ecological catastrophes (e.g. Chernobyl, chemical pollution, etc). At the beginning of 1960s and over the next twenty years the average Ukrainian family consisted of four people – father, mother and two children. In 1990s this index began to decline. And although during the last two or three years the birth rate has increased a bit, its growth has been insufficient to keep Ukraine from being called “the country of one-child families”.

The specifics of the Ukrainian state establishment caused the anomie of the social system, which has deepened since the 1990s because of globalisation and migration. Owing to the collapse of the Soviet Union, the deepening of the economic crisis, and decline in the living standards of the population, the level of migration has grown rapidly. Since the majority of migrants consist of the representatives of the most productive age groups in the reproductive and economic terms, indirect losses exceed the direct ones. Most people who left Ukraine do not intend to return. Emigration can be seen as a “brain drain”<sup>1</sup>. Together with the decrease of stationary migration intensification, external work-related migration, the movement of refugees and the transit of illegal migrants have become widespread. The low level of wages and salaries, especially in equivalents to other currencies and considerable unemployment have turned work-related migration into the main instrument to guarantee an acceptable level of life for the Ukrainian family. Work-related migration trips to the countries of the CIC (Commonwealth of Independent Countries), Western and Central Europe have become popular phenomena.

Most of the Ukrainian citizens in the recipient-countries hide their own motives for being abroad and in fact live there illegally. This results in a lack of social protection for working emigrants, dependence on employers and facilitators. Highly qualified

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<sup>1</sup> СКОТНА Н.: *Особа в розколотій цивілізації: освіта, світогляд, дії*. Українські технології, Львів 2005.

Ukrainian workers often do not work in accordance with their qualifications; they take jobs requiring few or no qualifications, which leads to a decrease in their professional level of competence. The length of time spent at work abroad ranges from two weeks to several years; on the average this period lasts about 6 months. About 5% of the total Ukrainian workforce is working outside the country. “Globalisation” implies system changes, processes occurring in economics, politics and the culture of national communities of the modern world. Those processes transform the old state and try to create their own world order. It is typical that most Ukrainians (71,1 %) regard globalisation processes with ambivalence<sup>2</sup>. The “market” is becoming a universal value, and it is reproduced in its roughest model, where humanistic values take a lower place in the hierarchy than money and financial welfare.

### **Transformation of family values under the influence of socio-economic factors**

Socio-economic factors motivate internal and external human mobility, aimed at assuring family material security. Judging by those processes occurring in Eastern European countries (a region in a period of transition) social psychologists and anthropologists trace a gradual substitution of the earlier established and declared (soviet, communist) values and principles of social co-living with new market-related principles<sup>3</sup>. The former principles of cooperation have been replaced by liberal individualism and competition. The worst aspect of this change is the fact that the fight for economic status has replaced the significance of sympathy and care in the social consciousness, force has replaced the need for non-hierarchical ways of problems solving, the separation of people has taken the place of family ethnic links and identifications. At the end of the 20th century, globalization processes and the specifics of state-building in a time of transition made the existing anomic state of the family and the whole social system much clearer. Anomie (from Greek – illegality) is a state of society, characterized by the collapse of the system of traditional values and norms and by the disorientation of the society and individuals. Moral-ethical standards are not produced under the condition of anomie in society<sup>4</sup>.

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<sup>2</sup> ПРИБИТКОВА І.: Зарубіжна трудова міграція як форма самозайнятості мешканців України. [Ін:] *Українське суспільство – 2003. Соціологічний моніторинг*. Інститут соціології НАН України, Київ 2003, рр.62-63.

<sup>3</sup> ХАЗРАТОВА Н.: *Психологія відносин особистості й держави*. Вежа, Луцьк 2004.

<sup>4</sup> ШЕВЧУК Л.: *Проблеми індивідуального й суспільного здоров'я в контексті трансформації соціальної мобільності*. “Соціогуманітрані проблеми людини” 2006, № 2, р.97.

## Socio-psychological family state

According to the data from a complex examination of household life conditions, conducted at the beginning of the 21st century, more than a quarter of population of Ukraine (26,7%) was classified as poor and 14,7% as destitute. Families with minor children constitute two-thirds of the poor population. Almost half of the poor population consists of families with children, in which all adults are of working age (47,2%). Yet 18 out of 100 poor families consist of the working adult members<sup>5</sup>. The majority of young families have difficulties in maintaining even one child without additional help. When it concerns two or three children, economic survival is almost impossible. Marriage and children are often put off to “better times”. Most often these are older couples who do not hurry to register their marriage or reject it: on the average, half the men and women are 25-29. The age of couples who are getting married is increasing. Rarely does one encounter student-age couples. A large percentage of women between the ages of 30 and 35 have never been married. Statistics from recent years clearly indicate that the number of marriages is decreasing, while the number of divorces, on the contrary, increases.

Postponement of marriage and having children distort the traditional model of the human- and family life cycle. In addition, some women consider it better to give birth to a child before they get married – a new social development in Ukraine. Most of the families having up to two children consist of family members, especially wives, who have finished special secondary or higher education. Modern women often postpone the birth of a first child until they are 30 – “career is first, and then come children”. Motherhood without marriage and having many children in socially unhappy families have become very common at a very young age.

Economic difficulties, lack of stability in the life of youth and diffidence about future – these are main reasons behind the unconventional (for Ukraine) matrimonial-family relationships. The number of legally unregistered (so-called civil) marriages is increasing. A new model of relationships has appeared in Ukraine – families of “new Ukrainians”, which can be characterized by a concentration on financial values. Most families of “new Ukrainians” have been created for mutual advantage: he offers a certain life level to her, she offers him her beauty. There is completely different model of psychological and cultural relationships and children-rearing in such families. Feelings of love and spirituality are not considered to be most important. Relationships are built according to the fashionable model – a child, a nanny, a good private school. If a husband has problems and he loses his business, a wife will not support him; she will simply leave him and look for another patron.

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<sup>5</sup> Соціальний індикатор рівня життя населення: Статистичний збірник. Державний комітет статистики України, Київ 2005.

Family problems and lack of time for communication with children cause the collapse of mental-spiritual family links and limit parents' and children's opportunities to spend free time together. Instability of relationships and lack of a necessary culture of family life and parents' alcoholism lead to the growth in the number of ruined families and children, who get placed into specialized children's institutions or turn to begging and vagrancy.

Psychologists and pedagogues claim that the majority of young married couples today are not psychologically prepared for marriage. Since nowadays individual freedom and the freedom in the choice of partner are the leading values, nothing can restrain a young couple from divorce. Having lost national family traditions, today's Ukrainian couples try to copy American life styles, with their pragmatic relationships, the full material independence of family members etc. whereas in American society, which is worried about dangerous family statistics, problems of morality and family are being solved at a qualitatively new level.

It is difficult to say what the future Ukrainian family will look like. However, the type of family with the positive constituents of the old model no longer exists, and new norms have not yet been established. The Ukrainian institute of social research, which conducts investigations within the project "Young Ukrainian family (1994-2015)," has obtained interesting results. They prove that, according to the scale of general human values, in most young families at the beginning of the 21st century the main place is given to family values (89,8% respondents). For creating a family, young people cite such values as health, children, love, financial security, sexual harmony, and confidence in themselves. All these mentioned values are tightly connected with the performance of family functions.

Concerning assumptions about one's family status, men give priority to the function of having and rearing children (90,3%); the second place is given to love satisfaction, personal happiness and feelings of security (74,2%). Given a choice between three family values listed in the questionnaire (love, children and mode of life), the majority of men chose love 74,7%, while only 15,5% considered having and rearing children to be the most important family value. Judging from the given data, we can assume that the dominant value orientation in the modern marriage is love along with personal happiness and emotional comfort in the family. Here, it seems that there is a conflict between the assumptions about the most important family functions since the first place should be given to the values of motherhood-fatherhood. Instead, many young people name love as the most important family value. However, 64% of respondents consider that the ideal family is one having two children.

## Specifics of the inner motivation of the family for migration

Anomic features of social family mobility are traced at the level of family members' motivation for work. Five to eight years ago unemployment was the main factor causing poverty in Ukraine. Today low salaries prevent families from rising out of poverty. All those factors push fathers and mothers into searching for work abroad. In addition, the rush for high incomes has become a personal goal and the reason for continuation of the migration state of family members (father or mother). The distorted understanding of family values, career and health on the part of many working migrants has been intensified by specific state policies. Let us address the quantitative parameters of the family members' migration. According to different statistical data, approximately five to seven million people have emigrated from Ukraine. The readiness of Ukrainian youth to emigrate is worrisome (fig. 1).

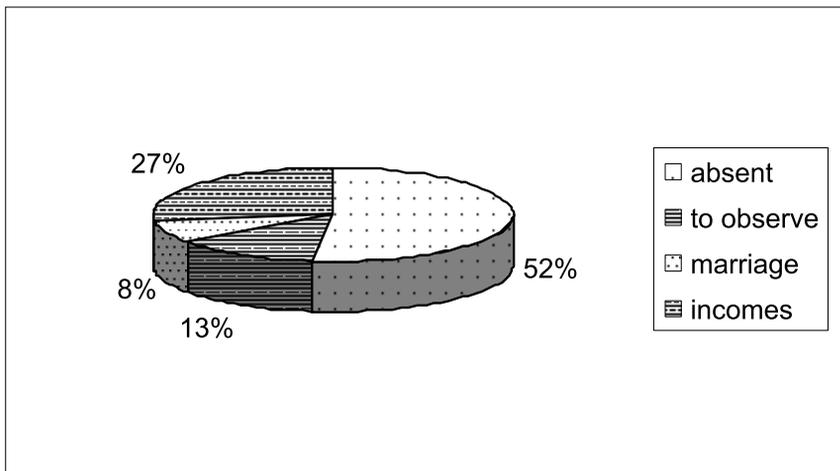
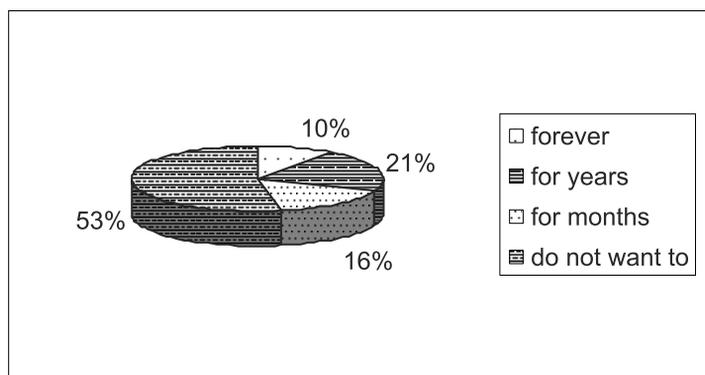


Figure 1. *Motives for youth migration.*

Members of young families turned out to be the most sensitive to the desire to emigrate. 47% of Ukrainians below the age of 40 are ready to go abroad. Moreover, members of couples express their readiness to let their partner take part in work-related migration, even for a period of years (fig.2).



**Figure 2.** *Readiness of young families to let a wife or a husband migrate.*

Migration processes have shaken the values of the rural family, which has been an eternal holder of motherhood-fatherhood values. According to the findings of the State institute of family and youth problems and non-state organizations (2005) the most frequent migration is among:

- members of rural families (living in district centres and small towns);
- persons between the ages of 25 and 27, most of them having families (50-60% have children as well).

According to the information from websites of the Ministry of Internal Affairs of Ukraine, young illegal emigrants constitute a group at risk. During 1998-2005 there were 1279 documented crimes of human trafficking.

### **Women's ageism and migration**

Processes of women's emancipation, which occurred earlier in Western Europe, also produced changes in the traditional family state. Ukraine supplies a substantial quantity of illegal emigrants, mostly between the ages of 30 and 45. Ukrainian women more often declare (as evidenced by many sociological polls and much psychological research)<sup>6</sup> their readiness to take up a career or to migrate, putting off marriage and children.

<sup>6</sup> ГЕРАСИМОВА Т.: „Другим голосом”: в поисках утраченной истории. “Гендерные исследования. Харьковский центр гендерных исследований” 2000, № 4, pp.227-246.

Ageism is a significant circumstance of the work-related migration among middle-aged women who leave their families. Globalisation and integration processes in all spheres of human activities gave Ukraine a great opportunity of entering a global labour market. On the other hand, those processes caused redistribution of working potential in the internal labour market. Hypertrophy of the national labour is an internal factor, which forces Ukrainians to migrate abroad in search of work. During the last ten years, the problem of social adaptation of certain population groups, dealing with the age category, has been more often discussed in psychological research on gender<sup>7</sup>. In addition, the problem of social disadaptation and economic dependence of women at the age of 40 + (10 years) is almost not noticeable. Social “ageism” is the basis of personal problems and migration, which are faced by most women of this age category.

Ageism is typically displayed as a limit on access to resources and the release of certain population groups from the participation in creating solutions. It happens most often that women of this age group have difficulties in adapting to dynamic social relationships of the competition-trade type. Under the influence of the social image of “Age”, typical female roles, such as self-education, professional activities, child-rearing and family duties, are transformed into significant social and working positions. Personal problems of “social demission” and “deprivation of individuality status” are typical for a significant number of middle-aged women, who usually have secondary education and good professional qualifications. The marginal position of middle-aged women (prior to retirement age and their so-called “social old age”) is caused by a range of objective and subjective circumstances, such as:

- strengthening of production relations of a competitive type in the sphere of female employment;
- specific policies in the sphere of state budget financing, where the great majority of women are employed (education, culture, medicine);
- disposition of 40-45-year-old women to give preference to the conservative (socialistic, soviet) forms of motivation over the creative types of employment and for the passive forms of organisation of their professional careers.

Age is a hidden reason for women to leave creative trades demanding high qualifications. Lack of work or low income causes the economic dependence of women and the low level of their future pensions. In order to survive women enter the system of secondary occupations in low-status, unregistered jobs in low-paid working places and completely depend on their employers. Such work intensifies the psychological feeling of marginality in women and their economic dependence and puts them into the group at risk. Women easily become potential victims of trafficking, alcoholism and homelessness etc.

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<sup>7</sup> ГАПОН Н.Н.: *Гендер у гуманітарному дискурсі : філософсько-психологічний аналіз*. Літопис, Львів 2002.

The majority of women applying to the state employment service are women of office workers between the ages of 40 and 45. This ageism is not based on any reason, besides the negative stereotypes of social perception. According to the psychological polls, many women are ready for complicated jobs; they have a high level of business leadership and are ready to change old professional settings<sup>8</sup>. 30% of women between the ages of 40 and 44 and 27% of those between the ages of 45 and 54 work in newly created structures (organisations and companies)<sup>9</sup>. This statistic has its own nuances; first, it has remained almost unchanged over years, secondly, women of this age more often perform the roles of employers than hired employees. It means that different types of social rehabilitation must be applied to this group of the population.

In July 2006 the Western Ukrainian Centre, “Woman’s perspective”, launched a new project, “Achievements of innovative mechanisms to overcome gender discrimination on the labour market”, supported by the Ukrainian Women’s Fund. The main aim of this project is to increase economic opportunities for women in the labour market and to work out practical mechanisms to overcome gender inequality and to lower the migration potential of middle-aged women. Its initial tasks are : a) to create efficient gender niches in the district occupation centres and credit communities; b) to teach the specialists of those structures to support those niches in the ideal state; c) to give an opportunity to private companies to get consulting and training services to improve efficiency of their business etc.

As we can notice, none of the project tasks are directed at changing the psychological components of “women ageism”. The psychological varieties of social rehabilitation for middle-aged women, on the one hand, do not refer to the necessary directions of social reforms, or on the other hand, to the directions of state support for their business activity. If, according to the poll data, almost half of middle-aged women are either unemployed or are in danger of being fired, there is an increased role for at least their psychological support (retraining, consultations etc). Therefore, workers of the state employment services and different funds should introduce as soon as possible into their perspective plans of work the development of activities promoting the psychological adaptation for women of this age category.

There also appears a necessity of country regulation of the factors, which cause migration processes of the young families’ members. State policy, even at the financial level, can lower the mobility situation of members of young families in search of work and money for supporting a family with a new-born baby. However, a financial payment after the child’s birth has a non-durable effect. Financial support for young

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<sup>8</sup> СМОЛЯР Л.О. (Ed.): *Жіночі студії в Україні: Жінка в історії та сьогодні: Монографія*. Астропринт, Одеса 1999.

<sup>9</sup> ГЕРАСИМОВА Т.: „Другим голосом”..., op. cit., pp.227-246.

families must be supplemented with the forming of civil consciousness in the growing youth, i.e.: a necessary return to an understanding by people of the meaning of life (what is the good of earning money if direct relationships with the family are lost?); realisation of the necessity of having children and rearing new generations who have to become better than their ancestors and have confidence in the future. Means of financial encouragement must play only a supplemental role. At the same time, we have to face the issues of how to improve living standards and what should be done to correct the demographic crisis. With regard to the latter, we must first work to provide qualitative social services and then to increase the birth-rate. The main role belongs to the spiritual and cultural policy of the state, from which economic and demographic policy will flow.

Can enlightening-explaining work influence the demographic situation and migration? Of course, propaganda promoting the family and a healthy life style can influence the demographic situation and decrease the migration desire of members of young families. However, this propaganda has also an additional function here to provide a strong world view basis and given an understanding of the meaning of life and one's own role in the stream of being. This must involve the beginnings of enlightening-upbringing work to form the family psychoculture of the young members of society. The problem lies in the fact that the values of the Ukrainian family have gone through many transformations<sup>10</sup>. Today in mass media as well as in everyday communication the most important link in the chain of being is lost, according to which the human life consists not only of work but of the family as well. In this case we have to work with children as well as with their parents and with youth.

In this situation different educational and informational programmes for children and adults can be helpful. There are different learning programmes and methods of work, especially interactive programmes for children in the form of play, and special programmes for juveniles. It is important that the family, society, institutions and mass media participate in the complex task of upbringing. A special meaning nowadays is given to information from radio, television, Internet etc. It must propagate family values and give information that positively supports the family and the child.

Today, the main effort for reducing the migration of Ukrainian families is put on the realisation of the project of demographic development. Taking into account the complexity and specifics of demographic problems, the Ukraine has adopted "By European integration", a Strategy of economic and social development of Ukraine for 2004-2015, approved by the Decree of the President of Ukraine on 24<sup>th</sup> April, 2004, No. 493 (493/ 2004). The priority directions of state family support are the creation of means for improving the financial status of families by:

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<sup>10</sup> ГАПОН Н.: *Вартості української родини в репрезентаціях студентської молоді*. "Молодь і ринок. Щомісячний науково-педагогічний журнал" 2007, № 8(31), pp.12-16.

- 1) increasing incomes, overcoming the poverty of the working population; realisation of constitutional guarantees for a minimal salary, pension and other types of social payments and help at a level which is not lower than the minimum standard established by the law; development of credits including use of tax credit mechanism; economic stimulation of families, especially by means of credit and tax instruments; state support of the establishment of family businesses, farming and investing in the development of social and production infrastructure of the village;
- 2) improvement of the conditions of lives of families by means of: the development of housing credits, youth credits, mortgages, intensification of popular participation in share building and living-gathering programmes; maintenance of funds for social living with the purpose of giving aid to the citizens who need improvement in their living conditions;
- 3) guarantee of child-rearing in the family by means of: the development of pre-school and extra-school care and education, including family forms; introducing social support for broken, socially unhappy, and poor families with children on the part of state and public organisations; improving of adoption laws, especially for children deprived of parental care; help for homeless children;
- 4) promotion of a high social status for the family by means of propaganda in mass media promoting having children, experience in the organisation of family life, introducing modern forms of preparing youth for marriage and the creation of a family; enriching matrimonial-family traditions, increasing the levels of motherhood and parenthood in the society, development of social services in the sphere of family service, giving them services and consultations;
- 5) decreasing the rate of external, especially work-related migration, overcoming its negative results and preventing them in future by making international contracts about mutual employment of citizens and their social security, stimulating the reversal of external working trips; guarantee of social security of Ukrainian workers abroad.
- 6) economic regulation of the internal migration streams by means of: the creation of a system of informing the population about the opportunities of employment in other regions of the country; development of “lighthouse” migration; overcoming sharp differences in the quality of life between different groups in the population.

Thus, with the purpose of weakening the negative aspects of the modern migration processes, which have been reflected in the state of the Ukrainian family, all positive resources of the informational society should be launched and social communication should be strengthened for the rebirth of the basic values of the Ukrainian

family. At the level of educational institutions, enlightening organisations, associations and religious communities, the family dialogue should be intensified, since family life activity is based on a psychoculture, which determines its social mobility. A dialogue with parents should be conducted regarding the economic motivation for the activity – what is the good of earning money if emotional and spiritual relationships with children are lost? At the level of civil initiatives, Ukrainian governmental institutions should be encouraged to develop social projects directed at reducing the size and speed of migration. International contracts regarding the legal aspects of migration are urgently needed in order to prevent the phenomenon of human trafficking. It is very difficult to refresh spiritual values of the Ukrainian family without the state undertaking reforms inside Ukrainian society, which would include social and educational projects.

## Dialectics of challenges and threats to security: migration aspect

### Introduction

In the last decade migration processes have become one of the most important demographic problems. They are here examined not only as usual, mechanical movements of individuals, but as complex processes, which involve many aspects of socio-political life. Migration phenomena need to be considered in the context of security problems because of the following conditions:

- widening of the legal field and growing attention of international community to issues of human rights, to which, unconditionally, the law to free movement belongs;
- necessity of analysis of the phenomenon of migration itself, with consideration of its goals and specifications in particular regions of the world, and level of its influence on other spheres of social relations, particularly on the sphere of security;
- changes of political and social parameters in the development of political structures, acceptance of acts that limit rights of immigrants who may be a source of danger and political instability;
- need of scientific reflection and understanding of socio-political relations between migrants themselves, as well as between immigrants and local society with regard to the security of state and society.

Results of migration are visible in many spheres of social life: political, social, economic, cultural-psychological and others. Additionally, these effects may be either *positive* or *negative* in character, becoming in this way a source of different conflicts. On one hand, the migration of inhabitants contributes to a large extent to balancing the labor market, changes the economic and social state of the community, and is often supported by an increase of educational and professional preparation. On the other hand, mass inflow of immigrants increase unemployment and intensify pressure on the social infrastructure. Migration also influences the demographic and social struc-

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ture, placement and settling of the inhabitants, their ethnic composition and leads to strained relations between different state interests or even to international instability. Scholars and political activists have begun to perceive migration as a challenge or even a threat to national and international security, especially after the collapse of the bipolar system, when the notion of “security” itself stopped being identified with military security but came to include other aspects, such as economic, ecological, political, ethno-national, demographic security and others.

## Content and specificity of phenomenon of migration

The term *migration* comes from Latin word *migratio* that means “movement, resettlement”<sup>1</sup>. In literature, one encounters different descriptions of the notion “migration”. In the Oxford’s Short Political Dictionary migration is understood as “constant movement of particular persons or groups from one territory to another”<sup>2</sup>. The Ukrainian scholar Horma understands as migration the following: “territorial movement of inhabitants, which is connected with change of place of inhabitation”<sup>3</sup>. In the Polish edition of the “Encyclopedia of political sciences. International relations”, “migration” means “territorial movement of inhabitants from one territory to another, which is conditioned by political, economic, social, ecological or other factors”<sup>4</sup>. However, migration is a territorial movement of inhabitants between different towns, regardless of duration, regularity and motivation.

Migration of inhabitants is classified according to different criteria, that is: reasons and motivations, duration, nature of making such decision by emigrants, way of its realization, territorial movements, and legal status of immigrants and so on.

Depending on causes and motives one can list the following kinds of migration: *economic, political, ecological, religious* and so on. All kinds of population movement that occurs as a result of the migrant’s freewill choice and aim to improve their material status belong to migration from economic reasons. Persons migrating because of economic reasons may be divided into the following categories:

- practical migrants – migrants who want to avoid poverty and unemployment;

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<sup>1</sup> ЮДИНА Т.Н.: *Социология миграции: к формированию нового научного направления*. Издательско-торговая корпорация «Дашков и К», Москва 2004, p.14.

<sup>2</sup> МАКЛИН І., МАКМИЛАН А. (Eds.): *Короткий оxfordський політичний словник*. Пер. з англ. Основи, Київ 2006, pp.402-403.

<sup>3</sup> ХОМРА А.У.: *Миграция населения: вопросы теории, методики исследования*. Наукова думка, Київ 1979, p.7.

<sup>4</sup> ŻMIGRODZKI M., ŁOŚ-NOWAK T. (Eds.): *Encyklopedia politologii*. V.5. Stosunki międzynarodowe. Zakamycze 2002, p.215.

- migrants looking for possibilities – migrants that would like to increase their incomes and raise their standards of living<sup>5</sup>.

Political migration comes into being as a result of changes of political regimes. In countries where a person that belongs to an opposition camp may be physically or morally destroyed, one finds the conditions for political migration. These migrations include mass movements of populations caused by change of state borders (repatriation of inhabitants) or escape of inhabitants from different forms of discriminations.

In the last decade we have witnessed migration processes caused by ecological factors. A basic motive for the movement of people is a need to look for a friendly natural environment because of the ecological crisis in regions or progressive degradations of the surrounding environment. These people can be classified as ecological migrants. The need to look for a friendly social environment motivates migrations of a racial, ethnic, religious character.

With respect to duration, migrations can be divided into permanent – when migrants stay in the new place forever – and temporary, usually lasting for a period of time after which the migrants want to return to the country from which they came. Permanent migration occurs in two cases: first, inhabitants move from one town to other, secondly, the movement is accompanied by a change of place of permanent inhabitation<sup>6</sup>. Among temporary migrations, one can list following kinds: episodic, financial and seasonal. Episodic migrations include all recreational departures or departures for different purposes, which take place irregularly or more than once and in different directions. *Financial migrations* are daily or weekly departures of inhabitants from the place of residence to work places (and back), which are realized in different towns. *Seasonal migrations* are movements of inhabitants, most frequently of working age, to the places of temporary work where they live for a period of few months, with the possibility of return to the place of permanent residence.

Based on whether inhabitants go abroad voluntarily, or not, one can divide migration into: voluntary and compulsory<sup>7</sup>. Migration can be voluntary, if migrant himself decides about it, and it can be compulsory, if a person is forced to move by different subjects. In the first case, the migrant has right to choose – within some limitations – his date of departure and destination. In the second case, the migrant is deprived of any right of choice. In this case migration is transformed into real banishment or displacement.

<sup>5</sup> GHOSH B.: *Migration, trade and international economic cooperation: do the inter-linkages work?* Paper prepared for the 10th IOM Seminar on migration, Geneva: 15-17 September 1992.

<sup>6</sup> РЫБАКОВСКИЙ Л.Л.: *Миграция населения: прогнозы, факторы, политика*. Наука, Москва 1987, pp.22-24.

<sup>7</sup> РИМАРЕНКО Ю.І.: *Міграційні процеси в сучасному світі: світовий, регіональний та національний виміри. Понятійний апарат, концептуальні підходи, теорія та практика*. Енциклопедія. Довіра, Київ 1998, p.740.

Depending on the manner of realization, migrations of inhabitants can be divided into: *organized* – they happen with the participation of state or civil governing bodies or with their support, and into *unorganised* (self-reliant), which are realized with own means and in own way by the migrants themselves.

One of important criteria for the identification of migration of inhabitants is the *nature of territorial movements*, based on crossing of some kind of administrative borders (state, district, city and so on). On this basis one can divide migrations into: *internal and external* (international)<sup>8</sup>. *Internal migration* is based on movement of inhabitants within borders between administrative regions, cities and so on. *External migration (international)* of inhabitants is connected with crossing state borders.

For international migration, such notions as immigration and emigration are employed.<sup>9</sup> *Immigration* means *entry into a state for permanent or temporary (according to the law – constant) living of citizens of other state. It is often connected with receiving new citizenship*. Immigration influences the dynamics of the number of inhabitants and its demographic effects are conditioned not only by the number of immigrants but also by their age-sex structure. It leads to mixing of members of different ethnic groups, which results in the formulation of a new ethos.

The notion of “emigration” includes highly-qualified workers, who go abroad permanently (*brain drain*) and workers, recruited to work in countries with high levels of economic development. These countries are not able to fulfil the demand for workers with own citizens; they attract illegal immigrants or refugees, who try to find asylum in specific country.

Depending on the *legal status of immigrants* migrations can be divided into: *legal and illegal*. *Legal migrations* are crossings of international borders by inhabitants of a specific country, possessing an entrance visa for specific period or staying in the other country by extending the term of validity of the visa possessed. Illegal immigrants are people who illegally enter another country to look for a job and those, who cross the border legally, but later work illegally, that is, without permission<sup>10</sup>.

Based on analysis of different classifications of migration as a phenomenon and emigrants as subjects, we can state, that there exists a close mutual relation between them. Therefore many authors classify migrations according to a few criteria. For example, English researcher Sara Collinson distinguished the following kinds of international migrations: 1) voluntary economic migrations (gainful emigrants); 2) voluntary political migrations (for example, migration of the Jews to Israel); 3) extorted political

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<sup>8</sup> Миграция в постсоветском пространстве: политическая стабильность и международное сотрудничество. Валент, Москва 1998, pp.102-105.

<sup>9</sup> ДЕНИСЕНКО М.Б., ИОНЦЕВ В.А., ХОРЕВ Б.С.: Миграциология. Издательство МГУ, Москва 1989, p.7.

<sup>10</sup> РИМАРЕНКО Ю.І.: Міграційні процеси..., op. cit., pp.130-131.

migration (classic “refugees”); 4) extorted economic migrations (refugees from places of ecological disasters and so on)<sup>11</sup>.

Today, it is very difficult to differentiate between notions of *refugee and emigrant*. As was mentioned in the 1951 UN Convention concerning the status of refugees, the term “refugee” can be used for describing a person, who due to justified anxiety of persecution because of his race, religion, nationality, belonging to particular social group or holding certain political beliefs stays beyond the borders of the state whose citizen he is, and who is not able, or does not want to use the protection of this country because of these anxieties<sup>12</sup>. However, sometimes it is difficult to determine the level of compulsion of the departure, and the difference between refugee and emigrant may be defined differently by particular countries depending on the number of people that ask for refugee status and on the political ground which caused their departure<sup>13</sup>.

In this way, migration as a social phenomenon is characterized by a multitude of forms and great complexity and by the diversity of ways of understanding this phenomenon, including the existence of many typologies and classifications.

### **The concept of security and the main attitudes towards its understanding**

There are lots of difficulties involved in research on the phenomenon of security, caused mainly by the ambiguous treatment of the sense of the term. The term “security” comes from Latin *securitas* – “casualness, peace”. In our understanding “security” is a complex notion, which is equated with certainty and means “lack of physical threats or protection from them”<sup>14</sup>. One can list three directions of translating the sense of security. The first direction is an attitude towards security as a multifaceted state, second implies a multilateral idea about how such a state should be and how it is for real, third treats security as a goal<sup>15</sup>. The state of security can be smaller or larger, or there can be no such state at all. Its sense can be realized precisely, or vaguely and half-consciously. Ideas about security can be correct, for example: to imagine adequately the state of security, or distorted: increasing or decreasing the real state of security or threat. In each case, the idea takes a precise stand towards the state and goal because the state is assessed adequately according to the idea and the goal is determined under influence of assessment gained in this way.

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<sup>11</sup> COLLINSON S.: *Europe and International Migration*. New York: Pinter Publishers, London 1994, p. 2.

<sup>12</sup> Стаття 1 Конвенції ООН про статус біженців 1951 р. Refworld CD-Rom, UNHCR, Geneva 1997.

<sup>13</sup> РИМАРЕНКО Ю.І.: *Міграційні процеси...*, op. cit., p.98.

<sup>14</sup> GOULD J.W., KOLB W.L. (Eds.): *A Dictionary of the Social Sciences*. Tavistock Publication, London 1964, p.629.

<sup>15</sup> ВИТКОВСКАЯ Г., ПАНАРИН С. (Eds.): *Миграция и безопасность в России*. Центр Карнеги, Москва 2000, pp.18-19.

In human consciousness, the idea of security is not precise, as the security itself is rarely created in it as an object of particularly deepened reflection. People feel more quickly than become aware of what security means to them, accept and assess it in connection with many of its meanings, not separating one from the other, and often include own feelings and assessments in an inappropriate notion of “security”, that unfortunately does not fully mirror the assessed state of security.

At the beginning these will be subjects and objects of security – all of the persons who create security and those who benefit from it. Depending on who acts as subject or object – a particular person, society, country or connection of countries – one or another *level* of security is being set:

- personal or individual security;
- societal security, or social security;
- national security;
- international security<sup>16</sup>.

Under the notion of personal security one understands the state of defence of an individual and his ability to face threats connected with his life, health, welfare, protection of his main rights, sources of the protection of his life and of the resources and environment in which he lives. Societal security means a state of priority defence of the system of goods, collected by socio-cultural environment, against the influence of external threats. National security is the state of defence of significant life interests of person, society and country against threats – either external or internal. And finally, international security – a condition of international relationships, which excludes disturbance of peace posing real threats to the development of mankind, toward which the nations be directed, without disturbance and pressures from outside and with the possibility of creating forms of their own socio-political development.

Another operational element is the endangering of security – factors, the presence or absence of which condition the existence of security on different levels. The German scholar F.-X. Kaufmann defines the threats to security as “*possibility of occurring of one or more negative phenomena*”<sup>17</sup>. Depending on the level of probability, threats can be *real* or *potential*. Depending on their origin, one can divide them into: *natural, technical and social*. Depending on their direction one labels them internal threats and external threats. Depending on the size of the threatened area, one can distinguish threats with global, regional and local character. Depending on the level of influence one can classify phenomena as causing, risk, danger, and threat. One can divide threats based on spheres of social life into political threats, economic threats, military threats, ethno-cultural threats, information and so on.

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<sup>16</sup> Ibidem, p.19.

<sup>17</sup> KAUFMANN F.-X.: *Sicherheit als soziologisches und sozialpolitisches Problem*. Georg Thieme Verlag, Stuttgart 1970, p.167.

One's ideas about threats determine the tasks of security, which, on the one hand, consist of eliminating the sources of threats on a certain level, and on the other, on the extension of limitations of security available for the subject, enriching of its sense. Its either positive or negative tasks are localized in specific directions of the life activity of the subject and in this way lead us to determined aspects or kinds of safety. Among the diversity of kinds of security one can distinguish those, which are visible almost on each level of security and have principal significance for supporting the security of all or for dominating the majority of subjects or objects. These include: military, economic, social, ecologic, physical, political, demographic, ethno-cultural, information, and scientific-technical security.

As it was shown above, the existence of a few (many) kinds of security may lead and often leads to contradictions between them. The task of each country is to look for wise compromises between different kinds of "Security". To achieve such compromises, to consolidate them and guarantee their correctness, one needs at minimum two conditions. Firstly, understanding the possibility of conflict between different levels and aspects of security. What is no less important is the precise imagination of how internal and immanent for each sub-social system (demographic, economic, political and other) security problems are, including those that occur by mutual activity of different subsystems.

### **Mutual relationships and relation between migration and security**

Migration as specific phenomenon was always considered in a particular context – economic or social, historic or cultural, demographic or ethnic. It was not quite accidental. Migration processes were, on the one hand, to a large extent determined by changes which happened in one or a few societies. In this meaning, migration is a tool of development of practically each sphere – political, ethno-social, economic and others. On the other hand, differentiating not only in quantitative but also in qualitative aspects, different migration paths having own specificity, influence situations either in societies from which the migrants come or societies that accept migrants. Very often, refugees and immigrants are generally accepted as objects that are defended by international charity organizations, and not as a problem of social or state security. Mass migrations lead to creation of internal instability in the country to which migrants came, and sometimes – to tensions in relations with the country, from which they come. Then, there may appear threats to international and national security<sup>18</sup>.

Studying the connection between phenomenon of migration and security, one can notice that these are basically different. Migration has visible personification in

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<sup>18</sup> LOEDCHER G.: *Refugee Movements and International Security*. Brassey, London 1992, p.5.

people included in the process of spatial movements, and security has more symbolic than specific clear expression, so it is to a larger extent identified with structures and institutions. Migration can be perceived in qualitative relation – however, a quantitative description of security is already more problematic. Migration in its functioning does not depend on qualitative assessment or depends on it only if this assessment influences the prohibition of migration or allowance for it. However, security is connected with qualitative assessment and does not function at all without it (although it can really exist as unconscious state)<sup>19</sup>.

By direct analysis of the problem it becomes obvious that migration is a real or potential challenge. In each case, it influences security as a state; it requires assessment according to security as an idea and is accepted or not with security as a goal. The connection of migration and security is bilateral. The problem “migration” and “security” in an analytic sense is divided into two aspects: the security of individuals, societies and countries involved in migration paths and the security of people who create these paths.

From the migrants’ security point of view and from the point of view of the environment they leave and that to which they come, the different structural characteristics of migration discussed earlier have great significance. Mass migration always disturbs to a smaller or larger extent the security system that functioned in the society before the growth of migration paths. However, migration, even if not on a mass level, can – if not interrupted and if not exhibiting a regular flow-- begin to ruin the security system.

Studying the *spatial aspect* of migration movements is particularly important for this analysis. This involves the division of population into two poles: outflow and inflow of people. Another characteristic of migration paths, important to study with regard to its influence on security are the circumstances of departure or entry, according to which migrations may be voluntary or compulsory in character<sup>20</sup>. The difference between them is that in compulsory migrations factors of pushing dominate on the pole of outflow, and in voluntary migration factors of attracting dominate on the pole of inflow.

### **Influence of migration on security of emigrants**

Analysing the influence of migration on the security of emigrants themselves, one can notice that the difference between life circumstances:

- which do not limit the free choice of the emigrant,
- which limit the free choice,
- in which free choice does not occur at all,

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<sup>19</sup> ВИТКОВСКАЯ Г., ПАНАРИН С. (Eds.): *Миграция и безопасность...*, op. cit., p.9.

<sup>20</sup> ВИТКОВСКАЯ Г., ПАНАРИН С. (Eds.): *Миграция и безопасность...*, op. cit., pp.37-38.

is characterized by which aspects of security are available and in which range and scope. Additionally, measuring one's life situation or reacting emotionally to it one can conclude that the acts based on personal experience and on assimilated ideas about security. With their help he assesses his security status in given place, where he presently lives and in the place, to which he is going, and corrects the old or formulates a new goal of security. On an individual level, emigrants more optimistically assess the available state of security than the society in the country, if they accept it mainly through the prism of difficulties that they have experienced from the moment of departure.

On an individual level, the most difficult security problems are connected with compulsory movements, decisions about which are made under the pressure of factors removing inhabitants from the terrain of their old inhabitation. The characteristic feature of compulsory migration is that the person wants to escape from dangerous circumstances. These circumstances threaten the feeling of economic security and narrow the social limits of security. In other words, negative motives are dominant, which associate with the outflow pole. In cases of voluntary migration, the motives for migration are usually positive: the emigrant wants to expand the borders of security he has already attained, protect those aspects that did not concern him earlier or that he was not aware of at all. However, he connects a possibility of their realization with his arrival. "Voluntary" emigrants choose a dream place of inhabitation, according to the rule: the best place is where their friends and family have already settled, where there is demand for their work, where they will be able to raise their level of education or professional development and improve their economic situation. In other words, "rejection factors" are more important for compulsory emigrants than "attraction factors"; the preservation of life is more important than its improvement.

Among the main subjects of security are the state (donor at the pole of outflow) – emigrants flows – the state (recipient at the pole of outflow). The most active forces are emigrants. They are subjects of a migration process that influences their own security as well as the security of other people. They are also subjects of calls for and threats to security. The increase of outer subject force of migrants paradoxically turns against them, so they lose to a large extent the quality of independent subjects in the sphere of their own security. Both compulsory emigrants and voluntary migrants remain dependent on the favour of societies that send them away or accept them and realize the migration politics of the state.

In each case, every migration movement from one territory to another contains a challenge to security among the emigrants. The transformation of this challenge into a threat to their security is specifically real in the case of compulsory migration, independent of the reasons that led to the movement. Movements of refugees, according to the rule, happen suddenly, rapidly, in conditions that threaten their life and their physical security. Refugees leave their homes in a hurry. And the region or country which accepts them is very often not known at all. Additionally, such movement is

most frequently connected with losing their residence, all means of livelihood, and saving some social status (ecological, economic and social security). When making their decision about migration, these emigrants know from the start that they have to sacrifice some aspects of security for other aspects. Therefore, in spite of the fact that threats to the security of those who are on the inflow pole disappear or significantly get weaker thanks to the fact of migration itself, new ones take their place, including some that were invalid until departure. Voluntary emigrants may experience threats to their security as a result of their movement. Threats to security may sometimes take on such dimensions that they cancel the positive results of voluntary migration. As a result, they will not compensate for the disadvantages that at the beginning were considered by the migrants only as unpleasant side effects of the decision made earlier.

### **Influence of migration on the security of individuals, societies and countries**

From the point of view of individuals, societies and countries that release and accept emigrants, the situation looks a bit different. By its analysis, we will see different aspects and levels of security. On an *individual level* migration flows constitute a threat particularly for the physical safety of inhabitants in the places receiving emigrants (crime, diseases, inter-ethnic fighting). Migration often leads also to the destruction of families and whole communities and the change of people (who remain at the pole of departure) into people living mainly thanks to the money transfers from emigrants. It constitutes a threat to their physical, social and economic security. Everything depends on the individual's residence; if he is placed in a centre that experiences migration flows, the extent to which a specific person is supported in own social net and to which he/she is dependent on this net is important. It is also important that the individual, in the pole of outflow as well as in the pole of inflow, accept the limits of his own security.

Analysing the influence of migration on the *security of societies*, it is necessary to note that each of the migration flows at the outflow pole creates a situation of deprivation or tearing of social ties – even at the cost of decreasing the number of migrants. At the pole of inflow we have a situation of sudden and additional pressure on such relations. Societies are prone to accept migration not only as a challenge but as an internal (in outflow pole) or external (in inflow pole) danger to their own security. Migration movements often lead to the partial or full deformation of the structure of societies, including their ethno-demographic, territorial and socio-professional dimensions. It happens in poles of inflow, and it is caused mainly by the problem of the “outflow of minds”, which is treated as a threat to security in demographic, economic, social, ethno-cultural and other spheres. In such cases the ethnic unity of the community declines, the normal functioning of social infrastructure becomes complex, which has

a negative impact on the reconstruction of the community. To these threats to security, connected with the outflow of emigrants, we need to add threats caused by their return, for example: as result of their importing patterns of foreign culture, learned in the country/region of stay to the ground of own environment (threat of ethno-cultural security)<sup>21</sup>.

Migration may create real or potential threats in every aspect of security, particularly in the poles of inflow. Subjects of creation of tension in sphere of social relations are people, for whom the possibility of socialization including to the new environment begins at the same time as their entrance into an environment of opposition: “we – they”, “friend – foreigner”. Particularly strong opposition of emigrants and indigenous society occurs when emigrants through their appearance and norms of behaviour reject the model of adaptation, which requires tuning to the environment and quick assimilation with it. A classical example is the “Caucasians” in Russia, who are leaders with regard to the phobias directed at “strangers”<sup>22</sup>. At the pole of inflow, migration may cause threats to the individual and social security of inhabitants, through increasing competition for local work and residential markets and the monopolisation of some sectors of economic activity by emigrants, the social and cultural marginalization of emigrants, their criminalization (economic, social and physical safety), the confrontation of ethnic stereotypes and norms of behaviours of emigrants with those of the indigenous society (ethno-cultural safety). In the society that accepts emigrants, migration may cause social tension in places of increased concentration of emigrants, cause local outbreaks of conflicts based on ethnic background, increase of xenophobia<sup>23</sup>, radicalism, and political extremism, caused by increasing of tension and conflicts, (political, military, social and ethno-cultural security)<sup>24</sup>.

The impact of migration on national safety differs on the pole of inflow and outflow. It is particularly visible in threats to the quality and quantity of labour resources in countries of outflow, and their extensive concentration in countries of inflow, the threat of declining production in some economic sectors in outflow poles, and increasing criminalisation of economics, marginalisation and social differentiation of inhabitants at poles of outflow and inflow (economic and social security of countries). What is caused by migration and is particularly significant for the donor-countries is the diminishing of their national scientific-technical potential, slowing down the scientific

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<sup>21</sup> СТАРЧЕНКОВ Г.И.: *Трудовые миграции между Востоком и Западом: Вторая половина XX столетия*. ЮНИТИ, Москва 1997, pp.125-130.

<sup>22</sup> СИКЕВИЧ З.В.: *Расколотое сознание (этносоциологические очерки)*. Сила, Санкт-Петербург 1996, pp.80-85.

<sup>23</sup> МАЛАШЕНКО А.: *Ксенофобия в постсоветском обществе (вместо введения)*. [In:] *Нетерпимость в России: старые и новые фобии*, Г.Витковская, А.Малашенко (Eds.). Моск. Центр Карнеги, Москва 1999, pp.5-18.

<sup>24</sup> ВИТКОВСКАЯ Г.: *Вынужденная миграция и мигрантофобия в России*. [In:] *Нетерпимость в России...*, op. cit., pp.151-191.

potential, and as a result restricting the total socio-economic growth of the economy, which makes threatens economic, military and scientific-technical security. The impact of migration movements on the ethno-cultural security of countries appears in their transformation of the ethno-demographic structure of the population, which can lead to the loss by indigenous ethos of national identification through mobilization of assimilation processes and imperfect politics of the state in this sphere. It concerns in equal measure the poles of outflow and inflow. Migration flows may constitute a threat to the national security of the host-countries that will be visible in emerging political parties and movements created by emigrants and their negative influence on foreign and internal politics of countries. It can lead to social and military instability and conflicts in particular regions or in the whole country (threat to military, political and social security).

Migration is a particularly important source of threats to the internal national security of host-countries, leading to the slowing down of the integration of the countries into global associations, as they lose their socio-economic, scientific, and military potential. The complexity of the relations of countries of inflow with countries of outflow of emigrants as a result of imperfect mechanisms regulating migration flows and the disturbance of norms of international law (threat to political and military security) can be ranked among the factors worsening the state of national security.

Without a doubt, migration movements can constitute a challenge or even a threat to *international security*. At global and regional levels the threats can manifest themselves, first in the strengthening of particular international factors, and then in the disturbance of balance of international security (threats of an political, military and economic character). The uncontrolled character of migration favours the active development of an international shadow economy, the increase of financial crimes among international circles, the emergence of criminal structures, which, like the state, introduce social control in life, division of goods and other things. Migration threatens the international, economic, political and social security. The mobilization of processes of the international trade in weapons, people, and drugs, and international terrorism with which the phenomenon of migration is strictly connected, creates a significant threat to different spheres of international security. And finally, international migration flows carry the threat of a significant spreading of mass illnesses and epidemics.

### **Specificity of migration politics of countries in the context of assuring security**

A country, unlike an individual or society, possesses more matter-of-fact instruments influencing migration processes, which, in the case of the country of inflow are necessary to use: *complete exclusion*, that is, prohibition of entrance of immigrants; *diversifying exclusion* or *segregation*, confining emigrants in social subsystems and in-

cluding them only in chosen spheres of social life (at first, the work market), at the same time limiting their access to other spheres through legal mechanisms (refusal of citizenship or maintaining differences between rights of the citizens and arriving people) or through usage of unofficial methods (racism and discrimination) (France, Germany, Belgium, USA, Japan, countries of Southern Europe and other); *assimilation* – politics of including immigrants to the society through one-sided process of adaptation by requiring abandonment of their previous language and culture, as well as mixing with indigenous inhabitants (USA, at the beginning of the 20th century, Canada after 1945); *integration* – weaker form of assimilation, in the process of which at the beginning immigrants could use own language, create own social, political and cultural organisations and so on, but the final goal was analogical to assimilation – total inclusion of immigrants by the dominant culture (England, Australia, Canada from 1960's); *pluralism* – accepting immigrants as ethnic communities and granting them equal rights in all spheres of social life, taking into account their diversity, but on the condition of their accepting the key values of given society. In the politics of pluralism, two mechanisms can be identified: *laissez-faireism* – by which one allows cultural and religious differences, but at the level of state politics there is no support for ethnic cultures, and *multiculturalism* where the majority of society is ready to accept cultural diversity and adequately change its social behaviour and even its social structure (Canada 1971, Australia 1973, Sweden first half of the 1970's)<sup>25</sup>.

In the case of the country of arrival, we can note the following instruments of state influence: *total exclusion* (prohibition of entrance of migrants) (Soviet Union); *diversifying exclusion* (partial allowance for entrance abroad for particular social or ethnic groups, for example, Jews in the case of the USSR); *pluralism* (free entrance abroad for all willing or creation of friendly socio-political conditions for intrastate migrations and solving problems with own forces).

In addition to the national level, migration politics is realized at global and regional levels through the activity of international organizations, the UN, IOM and others, and the acceptance by them of various agreements (1951 Convention from 1951 on refugees, 1967 Protocol). World conferences of the UN, which have official status and the documents passed by them, have more powers beyond mere recommendations. Migration politics at these levels is characterized by some contradictions, when the interests of the international community or of some international organization conflict with the national interests of particular countries. The second aspect of its contradictory character consists in the fact that the contemporary migration policies of the world's developed countries of the world have contradictory tendencies: on the one hand, since 1974 the harshness of its policies towards emigrants from “third-world

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<sup>25</sup> ЮДИНА Т.Н.: *Модели миграционных процессов в условиях глобализации*. “Социальная политика и социология” 2003, №4.

countries” has been rising. On the other hand, there has been liberalisation; there are more “light borders” within international regional agreements.

At different historical stages in the migration politics of national states, there has been one or another dominating element (emigration or immigration), that determined the essence of this politics. At this level, the contradiction within migration policies resulted from economic, demographic and geopolitical contradictions. Economic development needs liberal migration policies, at a time when political and national interests frequently requires a more strict character. This occurred in a particularly visible way after September 11, 2001 in the USA. Contemporary migration politics is determined by a country’s migration mix. Those countries with clear immigration histories define the contemporary migration situation in the world. They are the USA, Canada, Australia, countries of Western and Northern Europe, Arabian monarchies in the Middle East, Venezuela, Argentina, in North America, RSA, Singapore, Japan, Hong Kong in Asia, and Russia in post-soviet space.

### **Migration – a challenge or a threat to the security of individuals, societies and countries of international community?**

From the presented material it is clear that a country should perceive itself as the central element providing security and eliminating the threats caused by migration at different levels (from individual to international). Only a country can significantly prevent negative results that accompany the migration process. At the level of the state, the phenomenon of migration is created as a *challenge* and not a *threat* to security. At other levels (individuals, communities, international community), not only will the phenomenon of migration carry with it threats to security, but also the specificity of the migration politics of the state and level of its effectiveness.

What influences the effectiveness are given limitations that can be divided into external (obligations made voluntarily by a state, but with an international character and in light of globalisation processes that diminish the restrictive ability of the state) and internal (level of democratisation of the society and effectiveness of socio-political system).

With help of following scenarios we will present possible variants of influence of migration on security:

- In the case of strengthening of a national state, one can accept the introduction of harsh migration policies – as one of the instruments of preventing threats that accompany the migration processes. At individual, society and state levels, migration stops being threat and will be accepted as a *challenge* only once state migration politics are seen as effective. At international level, the strengthening of the security of the state through effective migration policies will not neces-

sarily constitute a positive contribution to strengthening international security. Some migration policies of the state serve to strengthen its own security at the cost of using the migration potential of donor-states (for example, the Manhattan Project for the USA). In addition, the introduction of strict migration controls and the accompanying disturbance of human rights may cause a negative reaction within the international community, increasing conflicts at the international level, and as a result, a worsening of international security. In such cases (through the instrumentalization of this phenomenon by the country) one can assess it as a threat to international security.

- In the case of an increase of influence of limitations – either external or internal, caused among other things by globalisation processes and by the so-called “erosion” of state sovereignty, one can predict the full or partial loss of ability of the state to prevent threats to security, particularly in the migration sphere. As a result of ineffective migration policies of the state, migration will carry a *threat* to security at the level of individual, society and, of course, the state itself (uncontrolled inflow of refugees, increase of social burdens, interethnic conflicts, growth of crime, etc.). In such cases, the elimination of the negative influence of migration processes on security may be accomplished by a country only through international cooperation and collecting positive experiences in solving migration problems. It is necessary to examine as a proposal the strengthening of international security to a level where migration is accepted only as a *challenge*.

In each case, the real or potential challenges or threats of the security caused by migration are tinged negatively. They become a stimulus for the society and state to undertake action for the re-adaptation of security. They force the state to look at migration from a different angle and favour the creation of new means of the widening and deepening of security.