



*Edited by*  
Lin Lerpold  
Örjan Sjöberg  
Karl Wennberg

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# Migration and Integration in a Post-Pandemic World

## Socioeconomic Opportunities and Challenges

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## PREFACE

International migration and its implications have been a central topic of academic and policy discussions for over a century. Research and public discussions have highlighted both the opportunities brought about by migration and its challenges, in particular how both individuals and societies alike can benefit from migrants' social, cultural and economic integration into the nations they migrate to. The opportunities and challenges of international migration and integration can be made more salient, alleviated or exacerbated by critical events. While deeply empathising and not in any way intentionally distancing ourselves from the human loss and suffering caused by the virus, the Covid-19 pandemic represents a critical event with the opportunity for important scholarly research. As we embarked on this project during the Spring of 2021, the Covid-19 pandemic had already left its indelible mark for over a year around the world. Little could we have known that by the time of publication, we would still be wondering when we could really say we are in a post-pandemic time. Nor could we have known of new crises currently being played out such as the Russian invasion of Ukraine in 2022, the resultant energy crisis or how the rapidly escalating climate crisis and its impact would come to the fore. It is our hope that the contributions in this volume, beyond critical events, will inspire further discussion and research for a more holistic understanding of international migration and integration, both the opportunities and challenges, and beyond current and future crises.

This volume is a result of a larger project, “The tourist industry and its contribution to sustainable development: social networks and social capital in the employment of immigrants”, generously funded by the Swedish Research Council for Sustainability (Formas 2018-02226). We gratefully acknowledge the important contributions from participants at our workshop in December 2021 along with two anonymous book proposal reviewers and our publishing team at Palgrave Macmillan led by Wyndham Hackett Pain. Special thanks go to the excellent language, copyediting, formatting and indexing by Rickard Björnemalm and Adam Lederer.

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## CHAPTER 1

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# Migration, Integration, and the Pandemic

*Lin Lerpold* , *Örjan Sjöberg*  and *Karl Wennberg* 

## INTRODUCTION

International migration and the integration of new residents continue to be not just a key challenge but also an opportunity for nations around the world. Demographically aging nations are dependent on foreign workers to sustain their economies. Richer countries constitute beacons for upward mobility for those from more impoverished backgrounds. On the other hand, these same countries contribute to the “brain drain” that hampers the developing world. Meanwhile, migrant access, reception, and integration at destination are at the heart of policy debates and research alike.

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In 2020, the Covid-19 pandemic reignited a focus on migration as countries around the world quickly halted economic activities and restricted the mobility of citizens, guest workers, and asylum-seekers (McAuliffe & Triandafyllidou, 2021; OECD, 2021). In parallel, conflicts continue to generate flows of migrants seeking refuge within and beyond the borders of their home countries, Russia's invasion of Ukraine in February 2022 only being the most recent example. Thus, migration and integration issues continue to be at the fore when policymakers meet. Adding to this, the expected number of displaced persons due to natural disasters far exceeds the number of refugees due to conflict. Climate change and other natural calamities could force some 216 million people to migrate by 2050, or so the World Bank's Groundswell report suggests (WB, 2021).

All in all, at about 281 million in 2020, the absolute number of international migrants as assessed by country of birth versus country of residence is higher than ever. Forced migration has also shot up, in 2020 reaching the highest number ever recorded. As Massey (2023, p. 45, this volume) notes, "The vision of peaceful globalization defined by orderly flows of international migrants seeking opportunities is fading from view." On the one hand, it is still true that the overwhelming majority of the world's population never resettles across international borders; on the other, the widely circulated assertions to the effect that the proportion of international migrants has long stayed around 3% can be questioned (McAuliffe & Triandafyllidou, 2021, p. 23). Not only is it a stock, hence saying little about flows as such, with little up-to-date information on the latter available. Since the world's population has systematically grown over the past few decades, the absolute number of those who live outside their country of birth has increased. Furthermore, even as the projections on those forced to move for reasons of natural disasters and as a result of climate change are subject to critique (e.g., Durand-Delacre et al., 2021), the phenomenon is likely to increase as climate change-induced disasters are becoming more common. All in all, a sense that things have gotten out of hand has replaced the calm confidence that international migration is both well-ordered and beneficial. Whether true or not, it has served to make international migration quite political.

While the sheer number of people—individuals, families—that are affected is interesting, the circumstances under which they move and are received is an equally pressing issue, no matter the proportion or numbers. Even under the regulated UN asylum quota, refugees face dire conditions

during resettlement (Durand & Massey, 2004; Betts & Collier, 2017). Many are subject to the ills of human trafficking and increased border control to hamper undocumented migration and further exacerbate conflicts and deaths (Massey et al., 2016; Betts & Collier, 2017), contributing to heated political debates as well as deteriorating conditions under which refugees are received. Refugees as well as economic migrants arriving in good economic times and in settings facilitating social network connections with natives through, for instance, sponsorship programs, volunteer networks, and extended family networks tend to be more rapidly integrated in the receiving country (Bird & Wennberg, 2016; Gericke et al., 2018; Senthanaar et al., 2021). Those factors absent, the prospects are, unfortunately, often harsher. Thus, both the processes of international migration and the conditions facing international migrants upon arrival in a new country affect their potential for successfully integrating in the new country's society and labor market.

## MIGRATION AND INTEGRATION

Understanding the antecedents, determinants, and consequences of international migration and successful integration in host countries is obviously multifaceted and complex. Integration often refers to a pattern or process by which migrants *process* become accepted into society, as individuals and as groups. This process can take various forms (e.g., cultural or labor market integration) and may imply distinct hurdles for individuals, groups, and society, as is discussed in several contributions to the present volume. Prevailing multinational (e.g., United Nations), pan-national (e.g., European Union), national, and sub-national migration policies play a significant role in managing migration and its effects on society, but often fail to achieve their declared objectives (Castles, 2004a). Key policy failures include issues highlighting the hegemonic power dimension between the Global North and Global South along with potentially hidden policy agendas, discourses, and implementation gaps (Castles, 2004b; Czaika & de Haas, 2013; see also Jerneck, 2023 and Malm Lindberg, 2023 in this volume), as well as a critical lack of solidarity between nations and an absence of pan-national frameworks and dedicated organizations to match (Scipioni, 2018). Beyond its impact on societies, various public policies on domestic and international migration also influence the agency and migration behavior of individuals (Shrestha, 1987; Castles, 2004b).

The relationship between migration policy and individual migrant behavior continues to play a central role in migration research (Bakewell, 2010). This is only natural as reducing it to a one-dimensional cost-benefit calculation (Sjaastad, 1962; Todaro, 1969) conducted by a prospective migrant will only take us so far (Massey et al., 1993). It has long been held that international migration is a social process set within a particular context that includes macro features, such as institutions and policies, alongside those that provide the immediate setting of the migrant, such as extended family networks (Massey & España, 1987). Thus, drawing on social network and social capital theories (Granovetter, 1973; Putnam, 2000; Lancee, 2012), the significance of relational approaches to migration has long been of interest to migration scholars (Castles & Miller, 2003; Bankston, 2014). As international migration often “take[s] place within an elaborate framework of administrative hurdles” (MacDonald & MacDonald, 1964, p. 83), social networks serve to lower the thresholds for migration. As such it is likely a factor both in chain migration and in onward migration (e.g., Della Puppa et al., 2021). Other phenomena of international migration, such as the existence of migration systems (Mabogunje, 1970; Skeldon, 1997; King & Skeldon, 2010) or cyclical and circular migration patterns, similarly include social and relational aspects in its focus on formal and informal elements. Thus, it comes as no surprise that also the economic sciences, which otherwise emphasizes human capital, is starting to model the economic impact of social networks on migration (Munshi, 2020).

Considerations like these fit well with one of the major developments in migration studies over the past few decades, that of an emphasis on transnationalism. In their path-breaking work, Glick Schiller and colleagues introduce transnationalism to underline that the study of migration must be put in a global perspective. Defined “as the process by which immigrants build social fields that link together their country of origin and their country of settlement” (Glick Schiller et al., 1992, p. 1), transnationalism implies that migrants build and sustain multiple links across borders. Digital communication and cheaper transportation obviously help, as do more liberal migration policies, although these policies can be put into reverse, as authorities’ reactions to the Covid-19 pandemic clearly demonstrated. In the European Union (EU), the legal pillar of “free mobility of goods and people” has meant that citizens have been free to move between member states to study, seek work, or enjoy leisure. Similar legislative provisions have existed for longer in the British Commonwealth and countries

with historical ties to the United States of America, albeit at times with legal restrictions tainted by colonialism and racism (Kukathas, 2021). The Covid-19 pandemic challenged the policy of free movement within the EU, with national restrictions on which, and under what circumstances, EU nationals were allowed to move. The development of the EU Digital Covid Certificate only partially solved full and free mobility within the EU borders.

Transnationalism is also related to the integration of migrant families and their offspring, often referred to as “the second generation” (Portes & Zhou, 1993), and can be seen as numerous partly complementary and overlapping, but also partly mutually exclusive, conceptualizations. That set of “distinct conceptual premises” is extensive and includes “transnationalism as social morphology, as a type of consciousness, as mode of cultural reproduction, as avenue of capital, as site of political engagement, and as (re)construction of ‘place’ or locality” (Vertovec, 2009, p. 4). For our purposes, however, the framework allows for developing trust in host country public institutions (Rogstad, 2023; Valdez, 2023, both this volume), for including family strategies and the various forms of mobility and migration available to them (as in Massey, 1990; Stark, 1991), but also what the relative attraction or availability of these are. The latter, including public sentiments and reactions toward migrants, are particularly relevant at a time when things are turned upside down by unexpected events of truly global reach. Commonly defined as “the movement of people across international borders for the purpose of settlement” (Rees, 2009, p. 75), *international migration* implies permanent or long-term settlement in a new country, in official statistics often approximated with a stay exceeding 12 months. Empirically, migration flows are much more complex than that definition implies. Many migrants move with intentions of long-term settlement but end up staying only briefly. Others move for reasons of temporary work, studies, or refuge, but end up staying permanently. Thus, Skeldon (2021, p. xi) reminds us that the “simple divisions between migrants and non-migrants or those who are mobile as opposed to immobile” must be used with care. As Triandafyllidou (2013, p. 3) notes, various “forms of circular or temporary mobility” are a crucial aspect of migrant transnationalism. In Sweden, the resident country of these editors, the most common annually registered “immigrant category” is in fact that of returning Swedish born. Thus, international migration comprises not just permanent forms but also temporary movements that together make up individual or collective mobility patterns. This leaves us

with the issue of transnationalism and integration, understanding how the two interact along various dimensions. As Erdal (2020) argues, both simultaneity and friction, be it antagonistic or productive, is at the heart of how transnational social fields mix and mesh.

All of this tells us that the decision to migrate, the rationale behind such a decision, and the forms it takes, including the choice of destination, cannot be reduced to individual traits alone. While individual characteristics, perceptions, and abilities may influence these decisions, a migrant does not act in isolation. This remains true although as the migration policy of some countries specifically targets some such individual traits, today often in the form of human capital: only those with higher education, certified professional credentials, or particular skills locally in demand will be considered for entry or permanent residency, thus placing the host country's societal "business case" above humanitarian concerns. Restrictive migration policies of one sort or another are nothing new; rather it has been an on-and-off affair since the nineteenth century. What it signals, however, is that the set of legitimate reasons—as seen from the perspective of the destination country—for relocating from one country to another constantly changes.

In part, restrictive migration policies emanate from supposed problems of integration into the host society, ranging from the displacements of locals from their jobs (or at least forcing down wages) to clashes of social norms, feared to undermine the very identity of the destination country. The rise of anti-immigrant and xenophobic parties across much of the Global North attests to this political tension. Among its many consequences, the introduction of progressively less generous policies and ever more complex legislative provisions for those who seek protection or family reunification can be observed (e.g., Federico & Pannia, 2021; Holtug, 2021), as can the gradual normalization of discriminatory anti-immigrant sentiments (Valdez, 2014; Gorodzeisky & Semyonov, 2016; Kuntz et al., 2017).

On the other hand, successful integration of international migrants into host countries is also multifaceted and complex, involving policies, individual agency, and social networks. One of the dominant ways of assessing integration, that of labor market participation, tends to focus on the category of migration, migration motives, or the domestic labor market situation: labor migrants (almost tautologically) do better than refugees and family members joining established migrants while countries with more flexible labor market arrangements see more extensive (and quicker)

integration than do those with more rigid rules (Kogan, 2006). Access to various forms of social capital resources, such as bonding and bridging social capital, is also shown to facilitate job finding and earnings growth among migrants in general (Lancee, 2012) as well as refugees more specifically (Gericke et al., 2018). Other studies report that countries with extensive labor market support policies do better than those with less generous structures and policies in place (Kanas & Steinmetz, 2021). However, empirical research on labor market integration struggles with selection bias with regards to, for instance, immigrant status; at the same time, labor market policy is rarely assessed in requisite detail (Andersson et al., 2019; Platt et al., 2022).

While the labor market integration perspective is important for gauging the processes and rates of self-sufficiency among migrants and how migration affects local and national labor markets, there are many other aspects underpinning the various interpretations of integration (Ager & Strang, 2008). The OECD/EU (2018) evaluation of immigrant integration includes 74 indicators used to assess host country results for the integration of immigrants with respect to the labor market and skills, living conditions, civic engagement, and social life when compared to natives. The socioeconomic variables used, such as employment, over-qualification, relative poverty, overcrowding, health status, and education levels, are relatively easy to measure and lend themselves to cross-national comparison. Yet, these indicators are criticized for being focused on developed nations and, at times, for being poorly defined (Boucher & Gest, 2015).

The concept of integration also has different functions in public policy and research, implying differences between normative aspects of policy making and scientific independence in research (Penninx, 2019). In their much-cited conceptual framework, Ager and Strang (2008) focus on four key indicators also found in the OECD/EU framework (employment, housing, education, and health). Their framework importantly contributes to our understanding by considering the foundation, facilitators, and social connections to underpin the “markers and means” reflecting the most widely measurements as indicative of successful integration. This is in line with other attempts to find workable and realistic typologies, such as those developed by Heckmann (1999) and used by, for instance, King and Mai (2008). These, along with structural (e.g., labor market) and cultural integration (e.g., language skills), also recognize interactive and identification aspects of integration. The latter two, which, among other things,

include friendships, intermarriage, membership in host society organizations, and a sense of belonging, are often difficult to capture, but may be expressions of “deeper” integration. Penninx (2019), summarizing these and other efforts, further suggests that it is useful to assess integration at three levels, that of the individual, the organization, and the institutional levels.

Beyond indicators of immigrant integration, and how these might interact with transnationalism, understanding outcomes through the context and dynamics of discrimination is important (see, e.g., Bilgili et al., 2023; Osanami Törngren et al., 2023, both this volume). Immigrant integration can be seen as a two-way process involving immigrants’ receptiveness to the structures, systems, and norms of a host society and the host society’s own engagement toward the immigrants. As mentioned before, societal cost-benefit considerations (e.g., Jerneck, 2023, this volume) continue to influence migration policies and notions of who are welcome based on the likelihood to contribute economically (Ellermann, 2020). Most policy is based on notions of meritocracy and encourages the attainment of human capital for successful integration. Even so, the so-called integration paradox describes the situation of immigrants who are more economically integrated and highly educated turning psychologically away from the host country because of a relative feeling of deprivation (Verkuyten, 2016). As such, integration may also be a factor not only in return migration but also in onward migration (Di Saint Pierre et al., 2015). Homophily (Lazarsfeld & Merton, 1954), or the tendency of “like to associate with like,” impacts all aspects of social life (Kossinets & Watts, 2009, p. 405) including not just the choice of migration destinations but also the successful integration of immigrants regarding employment, housing, and health. The dynamics of homophily are surprisingly persistent for newcomers (Mollica et al., 2003) and, although it can provide mutual support for in-group members, it can also provide fertile grounds for discrimination.

## ENTER THE CORONAVIRUS

### *Immediate Effects*

The Covid-19 pandemic quickly disrupted not just migration patterns but also the conditions facing migrants worldwide. Its policy consequences unfolded serious repercussions for existing migrant communities while



also adding new hurdles for prospective migrants. Generally speaking, no matter the reason for migration, migrants are more vulnerable to unemployment risks and, as it turned out, sectors where migrants typically first find work were hit especially hard by the pandemic (Platt & Warwick, 2020). Although the virus was initially thought of as a great leveler and its early diffusion did indeed correlate with long-distance and recreational travel as much as with poor socioeconomic conditions (e.g., Kuebart & Stabler, 2020), literally within weeks the opposite was discovered to be true. Unfavorable prior health conditions obviously took their toll, yet as the pandemic intensified it became evident that socioeconomic sources of risk (Devakumar et al., 2020) and “adverse non-health effects [were] likewise inequitably distributed” (Lerpold & Sjöberg, 2021, p. 352). Along those of advanced age, migrants were over-represented among those who contracted Covid-19 and suffered the most severe consequences of doing so (e.g., Indseth et al., 2020; Aradhya et al., 2021; Campa et al., 2021; Mude et al., 2021; Jaljaa et al., 2022). Reasons included poor living conditions, difficulties accessing health care (Kumar et al., 2021), lack of information about health precautions (Brekke, 2022; Zlotnick et al., 2022), migrant status (refugees, asylum-seekers, and undocumented migrants being particularly at risk; Burton-Jeangros et al., 2020; Suhardiman et al., 2021). The consequences of these typically “exacerbate[d] entrenched socio-economic advantages,” as Hu (2020, p. 3) notes with respect to the UK, even to the point of increasing the risk of being fired (Ahmed et al., 2023, this volume).

The responses from health authorities, policy makers, and regulators worldwide were varied, often unclear, and politically laden. With both risk and uncertainty running high, there were few, if any, role models or pre-established protocols to follow. Under these circumstances, solutions often took the form of follow-my-leader (Sebhatu et al., 2020), with the leader not necessarily being the World Health Organization but rather close neighbors, geographically speaking. Although this often started a process of stop-go policy making, it also introduced a degree of path dependence that led to a long period of (selective) closure to the outside world, the next to complete lock downs and border closures of entire countries (Australia, China, and New Zealand being noticeable examples). This often started with a focus on those arriving from countries identified as source countries—obviously China but also Italy figured prominently—at times accompanied by stigmatization and racism leading to hate crimes (Reny & Barreto, 2022). As the coronavirus spread, border policy

measures became general to the point that, in some instances, citizens were even kept out of their home country.

However, not everything was necessarily a result of impromptu policy decisions, and it is not unlikely that changes were introduced that may prove difficult to reverse. As Gamlen (2020) reminds us, some of it might simply be a continuation of existing trends, such as a slowing of migration growth during the years immediately preceding the pandemic. It may also be that the virus was used as an excuse to minimize the number of immigrants to a nation, a concern voiced in relation to the internment of migrants at the US southern border (Garrett & Sementelli, 2022). Be this as it may, beyond the first wave of the pandemic, some concessions to considerations other than public health could be observed.

### *Effects as They Stand in August 2022*

The realization that migrants often were among the most vulnerable to the onslaught of Covid-19—thus potentially reinforcing existing inequalities—is reason enough to consider the actual and potential consequences of the pandemic. Efforts to come to grips with the impact as it relates to migration and integration can be observed not only in the field of public health but also as it relates to socioeconomic impacts.

As assessed by industries, early victims of the pandemic included the tourism, hospitality, and agricultural sectors (e.g., Hershbein & Holzer, 2021). At the very beginning, tourism and hospitality saw demand drop precipitously (Gössling et al., 2021), while other industries soon found themselves cut off from supply of labor migrants. The latter was primarily the fate of agriculture: in many countries agricultural production critically depends on seasonal workers, many of whom are recruited from abroad. Agriculture, like tourism, hospitality, and leisure, are industries where international migrants oftentimes find their first jobs when moving from developing to developed nations. These are also jobs that imply increased exposure to the coronavirus.

Furthermore, agriculture is politically sensitive for food security reasons and matters the most to poorer households that spend more on food, proportionally speaking. Beyond food, many countries were quick to institute restrictions on exports of critical equipment, such as face masks, protective gear, and respirators. A year or two into the pandemic, other effects appear to have eclipsed such nationalistic moves—but may well have provoked yet others. Shocks induced by the pandemic were also channeled

through international supply chain trade, leading to a lack of core intermediate and final goods (e.g., Zajc Kejžar et al., 2022; Zhang, 2022; Ngo & Dang, 2023).

The changes brought by the Covid-19 pandemic and its effects on international migration had immediate policy implications for migration and for the status of migrants in host countries. Although the policy measures, their inclusiveness and generosity, differed substantially across countries, many initiatives sought to lessen the burden on migrants especially vulnerable to the health and economic consequences of the pandemic. “The exceptional character of the Covid-19 emergency,” McAuliffe & Triandafyllidou (2021, p. 5, italics in the original) notes, “has both reinforced the importance of citizenship as a priority marker” and extended the “*effective membership* further to include everyone present in the territory,” in practice determining access based on “effective presence in the territory of the state.” While this likely does not apply in practice to all migrants, the health-related policy shifts induced by the pandemic did have material consequences for those concerned. While it may have restricted access and made a mess of the manner in which transnational families and households normally organize their lives, in some cases it did provide openings that previously had been denied to those who had to contend with temporary residency and similar issues. Triandafyllidou (2021, p. 5) further suggests that “the pandemic has subverted our dominant understandings of desired, valued, and unwanted migration as those migrant workers previously considered ‘disposable’ like farmworkers, domestic and care workers, courier employees, and platform workers suddenly became ‘frontline’ essential workers.” In Canada, a country known for selective immigration policies, Macklin (2021, p. 27) argues that laws on quarantine had “the effect of reinforcing a stereotype of foreignness as vector of disease and danger to the body politic,” the word “‘essential’ became the stamp on the notional permit that validates movement” both into Canada and across its multiple provinces and territories.

Thus, the pandemic appears to have resulted not only in citizenship and national residence becoming increasingly salient but in some cases the privileges of citizenship were reversed; some countries, after all, refused to let their own citizens return home while temporary residents saw their right to stay extended. All of this makes for a bewildering and interesting mix of policy measures and outcomes—ranging from “detained migrants to essential workers” (Boris, 2021, p. 73)—the only constant across all cases, or so it seems, being that prospective asylum-seekers saw the

possibilities of having their cases heard diminish as borders closed with reference to the need of keeping the virus out.

### *Temporary or Permanent Impact?*

Once the pandemic recedes from view, international migration and subsequent integration challenges will continue to be important issues for scholarly attention for the foreseeable future. This is certain as the industries that shed labor in the immediate wake of the pandemic are scrambling to find workers to fill the slots vacated since March 2020. Of course, the pent-up demand and flight from certain occupations might be of a transitory nature if national and international labor markets are able to adjust back toward a pre-pandemic situation. However, international security crises, like the Russian invasion of Ukraine and its consequence of energy shortages and inflation may exacerbate labor shortages. To what extent effects of the pandemic on migration and integration processes in isolation or of a short- or long-term nature is an empirical issue. There are structural features that may or may not prove resilient to the widespread consequences of the pandemic. Does it have such demographic effects that it effectively turns experiences, ranging from those captured by the first and second developmental demographic transitions of declining birth and mortality rates and to impacts on migration, upside down—or will it simply revert to the trends observed prior to 2020? Will it change the volume and direction of migration flows in ways that create an entirely new situation or will it merely be a temporary blip on the curve? Will it change migrants' behavior, for instance with respect to patterns of transnational living and cross-border care? To what extent can changing international mobility patterns bring changes in remittances, both pecuniary and social, and other similar expressions of care for members of extended families? Will diaspora relations at large change? The strict travel laws brought about by the pandemic have affected migration policies in many countries, but will they now revert to those in place prior to 2020? Similarly, will modes of integration—economic, social, cultural—be affected or are we stuck with the same set of hurdles and problems that were recorded across diverse contexts before the advent of Covid-19? Will any successes that might have been achieved be unraveled, prove resistant to replication, or can they be built upon to further advance social cohesion and welfare?

These are important questions for scholars and policymakers alike. Events like the Covid-19 pandemic may not only serve to upset the status

quo but also have a lasting impact on international migration theory, policy, and practice. The Covid-19 pandemic is a critical event with the opportunity of reevaluating our extant knowledge through a Rushdie (1992) “broken mirror” lens, and thus provides fertile ground for new research that should give pause to policymakers. How does the pandemic compare to other similarly critical and potentially transformative events of, say, a geopolitical or natural resource nature. It is partly a question of scale. Do events have to be global in scope to make manifest changes that refashion or destabilize existing patterns? Can lessons be learned from events that are more geographically limited, such as Brexit (e.g., Sredanovic, 2021)? Are there structural features of a demographic sort that are geographically confined yet will have repercussion well beyond the areas immediately affected? Must an event be dramatic, unfolding over the course of a few weeks or months, as was the case with the pandemic? Perhaps long-term shifts will be equally seismic, only that we do not observe them or their effects until well into the process. Climate change could be such an eventuality—had it not already been set in motion, that is, its effects being observed across the globe in various forms and initially at very different magnitudes.

### WHY THIS BOOK?

Migration and integration were intensely discussed before the pandemic. When the pandemic hit, focus skewed away from migration *per se* to overall pandemic measures, pandemic relief, public health, and the attempts to avoid a severe economic recession. However, as we have seen, the effects of the pandemic on both migration and integration processes have been profound. This motivates the current volume’s focus on migration *and* integration. Together with our author contributors, we consider what the immediate and longer-term impacts of the Covid-19 might engender across a wide range of areas. That is, if any such impacts are visible, or visibly invisible, and thus as interesting.

A holistic understanding of migration and integration benefit from many different points of departure in theory and methods. In this book, we approach the broad topic with a predominantly socioeconomic lens. This requires focus on how migration-related issues are shaped by both social and economic concerns, both for individual actors and for collectives (groups and society as a whole), along with a clear purpose of policy or research implications. We approach the Covid-19 pandemic as a critical

event in that a causal outcome has occurred (or may occur in the future) because of it (García-Montoya & Mahoney, 2023). The book discusses whether the pandemic will impact the volume and flows of international migration and whether the pandemic has brought immigrants together or driven them apart. Further the book considers how economic and migration policies have been or are likely to be impacted by the pandemic and explores salient organizational actors in the chain of migration and integration such as the trade unions and civil society. Finally, the book turns to aspects of integration as illustrated through labor market sorting and different groups' employment, along with Covid-19 vaccination prevalence. The main objective is hence to provide a research-based collection of theoretical and empirical chapters combining economic, political, and sociological perspectives on migration and integration. Bringing fresh empirical material to bear on academic and policy discussions on international migration and integration of migrants in host countries, emerging from perceived and actual changes brought about by the Covid-19 pandemic.

## CHAPTER OVERVIEW

Following a cue in the highly successful *The Age of Migration* (de Haas et al., 2019), we recognize the interaction between macro- and micro-structures. With this, we mean the interaction between political economy issues, the relationship among states, and the policies and institutional environments of the countries as well as the networks and community ties alongside the transnational nature of migrant experiences and behavior. Ranging from the political, the community, and network oriented, to the individual, the chapters in this book are organized following the logic of moving from macro issues toward microstructures and behavior. Our book starts with a description of international migration through history to better understand how the Covid-19 pandemic might impact on the future. Massey (Chap. 2) presents three eras of mass international migration: the forced migration of Africans to the Americas during the mercantilist era, the mass movement of free Europeans to the Americas and Oceania during the laissez-faire industrial era, and the global movement of people from varied origins to diverse destinations during the neoliberal post-industrial era. Importantly, Massey's chapter forecasts the likely course of migration in the period ahead through a review of the demographic, economic, climatic, and governmental circumstances prevailing

across world regions. He foresees an acceleration of migration between developing and developed regions composed increasingly of people moving to evade threats at places of origin rather than to access opportunities at places of destination. Drawing out the lines, it is likely that the Covid-19 pandemic will have a marginal lasting impact on international migration. As the number of international migrants has grown over time, individuals increasingly and simultaneously identify with, and are supported by, multiple national cultures, thus combining country of origin and country of destination cultures.

Drawing primarily on the experience of the Netherlands, Bilgili, Leung, and Malinen (Chap. 3) explore the dynamics of transnationalism before, during, and after the Covid-19 pandemic. They discuss and assess changes that materialized from the pandemic isolation across different dimensions of migrant transnationalism to provide an initial understanding of how the pandemic changed and transformed not just economic and social transnational engagements but also experiences of discrimination and stigmatization. The Covid-19 pandemic not only affected everyday lives of migrants but also the social and economic connections with their families and friends in different home and host country contexts. The maintenance and, at times, the intensification of transnational relationships highlight how, in times of crises, migrants rely on each other, especially for their individual and collective resilience.

Migration policies are inherently connected to economic policies and, thus, to the attitudes toward international migration. Jerneck (Chap. 4) juxtaposes what he calls “cosmopolitanism” against “welfare chauvinism” as two alternative policy approaches to migration. Before 2015, Sweden appeared to take a cosmopolitan approach, with a high tolerance for immigration. It rapidly became more restrictive after the 2015 refugee crisis, with proposals to limit the welfare state to citizens who have already “paid in” to the system. Jerneck explores this shift by focusing on the role of an underlying economic policy paradigm based on the idea of scarcity. The official welcoming attitude toward immigrants was undermined by simultaneously framing their presence as a burden on the state budget. The dominant idea that tax money is scarce, and the state should maintain a balanced budget means that higher spending on immigration is expected to come at the expense of the welfare state. This idea shapes the public debate and is institutionalized in a fiscal framework that mandates a government budget surplus. Jerneck finally explores a paradigm

that is more amenable to cosmopolitanism in the frame of functional finance.

Though the national economic situation and subsequent policies provide the context for migration policies, Bucken-Knapp and Zelano (Chap. 5) investigate a particular policy trajectory implemented from 2017 until post-Covid. The chapter analyses a specific Swedish initiative known as *Gymnasielagen*, or the High School Law, allowing for approximately 9000 unaccompanied refugee minors, despite their rejected asylum status, to receive permanent residency if employed within six months of completing their upper secondary education. The outbreak of the Covid-19 pandemic made it difficult for most young refugees to obtain long-term employment within the allotted 6 months. A proposed reform to the High School Law, which would have improved their opportunities for employment, was rejected after highly publicized debates among the political parties. The chapter details how this reform was framed by the political parties throughout 2020 and 2021, using parliamentary transcripts, supplemented by news and social media materials. The analysis combines impressionistic approaches to interpretive policy analysis with the ideational turn in institutionalism and governance research, highlighting how context-specific policy legacies and hegemonic problem definitions determine who was viewed as worthy of policy reforms addressing their needs.

Policies, no matter their antecedents, need to be implemented. How bureaucrats implement contested migration policies, such as enforced return or deportation, strikes at the heart of the most central debates within the migration control literature. An ongoing debate in this literature concerns the “gap hypothesis,” contending a gap between goals of national immigration policy (laws and regulation) and the actual results of policies in that area (policy outcomes). Malm Lindberg (Chap. 6) addresses the question of what characterizes implementation success and failure, in particular what role the organizational context plays. Focus is on three aspects: understanding, ability, and willingness to implement policy decisions. These aspects are analyzed using examples from Sweden based on fieldwork data collected and analyzed within the Return and Reintegration project at the Migration Studies Delegation 2018–2019. The chapter highlights the role of street-level bureaucracy in the implementation of enforcement and return policy and considers the impact of the pandemic on implementation.

Beyond public agencies working to integrate immigrants in the work force, trade unions are particularly important in the European context. Marino, Martínez Lucio, and Connolly (Chap. 7), considering social



inclusion in France, Italy, and Spain, and look at how specific class-based union strategies have attempted to directly support groups of migrant workers in an increasingly fragmented labor market. After providing an overview of traditional union actions aimed at promoting migrants' inclusion, the chapter presents innovative strategies not just at the local and territorial levels but also within the broader organizational structures. The aim is to show that while these forms of inclusion and support constitute an important response to changing conditions in the labor market and wider society, there remain tensions in terms of the sustaining and democratizing of such initiatives across time. The chapter also reveals the political complexities of social inclusion and the way it is enveloped in competing sets of trade unions' approaches and agendas.

Sweden is an interesting case study of trade unions and the challenges that migration can pose to industrial relations in a highly unionized country with strong labor market stakeholders. Swedish unionization has generally dropped, especially among foreign-born workers. It is known that immigrant workers are more likely to be in long-term unemployment or enduring precarious employment conditions, both becoming especially salient during the Covid-19 pandemic. The gap between native and foreign-born workers, both in terms of labor market conditions and unionization, presents a challenge for Swedish trade unions, especially the blue-collar ones. Growing anti-immigration sentiment, paired with diminished support for center-left parties and increased support for the radical right, has exacerbated these challenges. Bender's chapter (Chap. 8) provides an insight into whether foreign background explains differences in unionization and shows that workers who are comparable in terms of age, gender, sector, class (blue- or white-collar occupation), place of residence, and form of employment, have roughly the same likelihood of being union members. He argues that labor market sorting matters most and that Swedish trade unions use a default-inclusion strategy that organizes all workers through the same mechanisms and into the same structures. The organizing principle behind this strategy is class, profession and sector, rather than country of origin.

In addition to the public sector and trade unions, civil society and so-called third-sector actors are important for the integration of international migrants in their new host countries. Women with low education levels and weak local language skills are typically considered to be the most marginalized and furthest from the labor market. Nachemson-Ekwall (Chap. 9) focuses on this group of migrants positing that they face

cultural and ethnic adversity, poverty, and exclusion. This group of migrants does not respond to standardized labor market integration programs and the author argues that creative new solutions are needed. One such solution may be so-called work-integrating social enterprises, often run as social cooperatives with a focus on democratic involvement. Including a hybrid business model, these civil society actors have both economic and social goals as their purpose in equal measure. Contextualized in the Swedish welfare state system, in particular its liberal market economy, the chapter suggests that there are post-pandemic signs of a more resilient societal contract rebalancing the roles of the public and private sector in favor of new models for immigrant women-labor market integration in the future.

Rather than focusing on a specific group of international migrants and their labor market integration, Kazlou and Wennberg (Chap. 10) set sight on specific sectors and skills requirements. Their chapter examines the sorting of workers from various immigrant groups in Sweden into certain sectors and jobs, and compares these patterns to jobs held by natives in the same sectors. Emphasis is put on the skill composition of jobs and how this affects the sorting of migrants and natives active in the three industries selected for analysis. Using matched data on jobs, employers, and workers in hospitality, construction, and retail industries, they document patterns of country-of-origin-based segmentation. It seems that immigrants primarily enter routine jobs requiring a higher level of technical skills, compared to natives who are more often found in non-routine jobs requiring interpersonal skills. When compared to the hospitality sector, both immigrants and natives in the construction and retail sectors work mostly in non-routine jobs. These stark patterns of job segregation suggest that education and training efforts among migrant workers should specifically consider the acquisition of language and interpersonal skills in addition to formal training and education.

Human capital in terms of education and skills is often cited as being critically important for success in labor market integration. Indeed, a meritocracy assumes that we can objectively assess “the right person for the job.” Yet we know that homophily and unconscious bias play a role. As such, discrimination, in its many facets, has become increasingly important in understanding how immigrants are integrated into the employment. Ahmed, Lundahl, and Wadensjö (Chap. 11) review the economic literature on discrimination, including during the pandemic. Ethnic discrimination, common in labor and housing markets, leads to lower wages and higher unemployment for ethnic minorities, to segregation in the labor

market, and to residential segregation. Several studies show that the Covid-19 pandemic increased the extent of such ethnic discrimination. The prejudice against hiring migrants may have increased because people from countries where the epidemic started or from countries with lower vaccination coverage were blamed for the spread. It may also have increased in those cases where the Covid-19 pandemic led to higher unemployment, making it less costly for employers to discriminate.

Following on the theme of discrimination, according to accounts from around the world, minority groups of individuals with an Asian appearance were particularly targeted throughout the Covid-19 pandemic. With a steady growth in the number of immigrants from Asian countries to Sweden since the 1970s, Asians are becoming increasingly visible among the Swedish population. To tackle the historical “narrative scarcity,” Osanami Törngren, Irastorza, and Kazlou (Chap. 12) use register data to describe the educational position and employment situation of the ten largest East, South, and Southeast Asian groups in Sweden, in comparison to non-Asian immigrant groups. They find differences based on the regions of origin: East Asian immigrants were highly educated but had lower employment rates. Once employed, they worked in highly skilled occupations. Southeast Asians had lower education levels and were under-represented in high-skilled jobs yet had higher employment rates. South Asians levels were in-between these two groups.

Finally, two chapters present data on the prevalence of Covid-19 vaccine inoculation among different immigrant groups residing in Norway and in Sweden. Norway is characterized by an image of small differences overall, where equality appears as a core value, forced by strong personal and institutional trust. However, the Covid-19 pandemic revealed that there was a greater variation between different ethnic groups and native born. Rogstad (Chap. 13) explores what might explain the differences and what it tells us about economic versus cultural integration. Theoretically, his chapter explores a distinction between vertical and horizontal loyalty to public institutions. The chapter is based on both statistical data and interviews with young people aged 25–35 with an immigrant background who live in Oslo. In Norway, a fundamental assumption is that economic and cultural integration is interrelated. When comparing the vaccine rate (cultural integration) and having a job (economic integration), it seems clear that these two dimensions are not equally distributed, with labor migrants originating from Pakistan and Poland having very different kinds of loyalties. The Pakistanis, with generations of immigrants in Norway, had higher unemployment levels,

but vaccination levels that were on par with Norwegians. In contrast, the more recently immigrated Poles, with high employment levels, were more skeptical. Poles appeared to be more receptive to the vaccine hesitancy of their social networks in their native Poland, holding a different view of vaccines than the majority population in Norway and the Norwegian authorities.

Beyond institutional trust, employment, and longevity in a country, vaccine hesitancy could also be affected by country-of-origin location segregation in the host country Valdez (Chap. 14) explores immigrant integration and vaccine hesitancy among Somali immigrants in Stockholm. When immigrants are segregated, their integration can be hindered because they are cut off from social networks that contain valuable sources of cultural capital that could otherwise help them adapt to their new home. Therefore, the communities that immigrants live in can have important consequences for their integration. Some neighborhoods, as a function of demographic composition or urban design, encourage inter-ethnic interaction, while others inhibit it. In this chapter, two neighborhoods known to house a group identified as vaccination hesitant are explored—Somali immigrants in northern Stockholm—in order to provide insights into the compositional and built environment factors that may lead to vaccine hesitancy. Neighborhoods that discourage interactions between immigrants and ethnic majority group members may exacerbate existing conditions that lead to vaccine hesitancy—lack of information about vaccines, lack of access to medical care, or lack of institutional trust.

The final chapter Lerpold, Sjöberg, and Wennberg (Chap. 15) concludes with a discussion of the overall findings relative to the purpose of the book and thoughts on further research as well as policy implications.

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## CHAPTER 2

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# The Shape of Things to Come: International Migration in the Twenty-First Century

*Douglas S. Massey* 

## INTRODUCTION

The world has witnessed three eras of economic globalization in modern times. The first era ran roughly from 1500 to around 1820 and was grounded in a pre-industrial technology with an agrarian economy and a mercantilist ideology. The second era began around 1820 when the advent of industrialism led to an expansion of international trade and investment under an ideology of laissez-faire capitalism that fueled global economic expansion. The second era of globalization ended abruptly with outbreak of the First World War in 1914 and was definitively curtailed by the imposition of immigration restrictions and tariff barriers in the 1920s and 1930s, ending a century of industrial expansion.

Rather than progressing directly to a new era of economic globalization, the second era was followed by a long interregnum that began with the conclusion of Second World War, when new multilateral institutions

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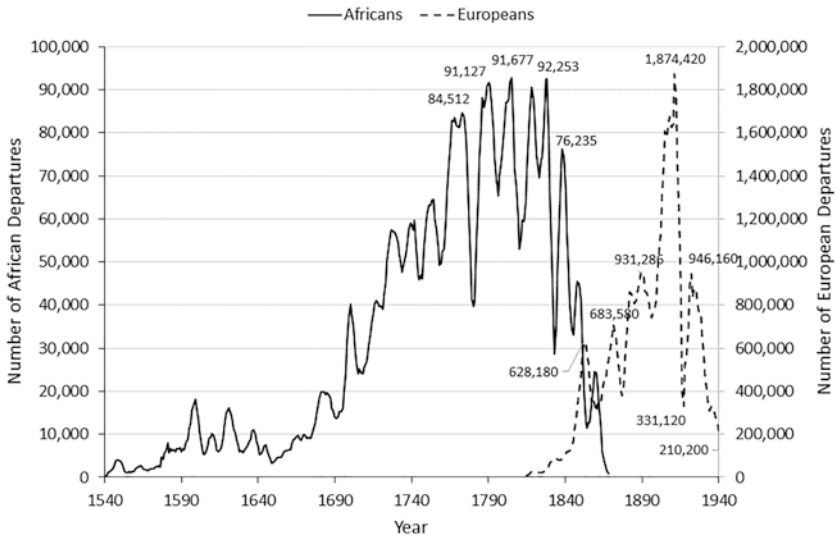
were created to resurrect industrial capitalism under a Keynesian ideology that slowly restored international trade and global investment, triggering a new wave of cross-border migration. The third era of globalization began in the 1970s, when the shift from analog to digital technologies created a new, knowledge-based economy grounded in services rather than manufacturing, one that spread globally under a neoliberal ideology.

### INTERNATIONAL MIGRATION IN THE MERCANTILE ERA

Operating under a philosophy of mercantilism, during the sixteenth and seventeenth centuries, the nation states of Europe applied tariffs and erected trade barriers to minimize imports and maximize exports while projecting their power abroad whenever possible to colonize and exploit large swaths of the Americas, Africa, and Asia (Magnusson, 2015). Relatively small numbers of European settlers migrated to the colonies to establish extractive systems of governance that transferred wealth back to the colonizing powers through royally chartered monopolies. Wealth was created by mining precious metals and by cultivating high-value crops on plantations with large inputs of cheap, unskilled labor. Although the colonizing powers experimented with systems of indentured servitude and penal labor to provide this labor, they ultimately came to rely on the institution of chattel slavery, which entailed a massive, forced transfer of enslaved persons from Africa to the Americas.

Between 1500 and 1870, some 12 million enslaved Africans were exported as property into the Americas (Klein, 2010). The solid line in Fig. 2.1 shows the number of enslaved migrants exported by year with the scale shown on the left vertical axis (using data from Slave Voyages, 2021). As can be seen, the Atlantic slave trade began modestly in the early 1500s. Through 1696, the number of exports never exceeded 20,000 per year. After 1696, however, the volume of the slave trade expanded rapidly, reaching 84,512 in 1773. Over the ensuing six decades, the outflow fluctuated at relatively high levels, with notable peaks in 1790 (91,127), 1805 (91,677), 1828 (92,253), and 1838 (76,235).

After 1838, the number of enslaved migrants exported from Africa dropped in response to political resistance to slavery on both sides of the Atlantic. Although trade in human beings was banned in the British Empire in 1807 and in the United States in 1808, it continued within the Spanish and Portuguese colonies well into the 1860s. Slavery itself was abolished in 1838 by the British, in 1863 by the Dutch, and in 1865 by



**Fig. 2.1** Enslaved Africans and free Europeans departing their continents of origin from 1540 to 1940 (five-year moving averages). *Source:* Slave Voyagers (2021), compiled by author

the United States. Slavery lingered on in the Spanish colonies of Cuba and Puerto Rico until 1886. In 1888, Brazil became the last country to abolish slavery, bringing the mercantilist era to an end (Black, 2021).

## INTERNATIONAL MIGRATION IN THE INDUSTRIAL ERA

As mercantilism and slavery were dying out over the nineteenth century, a new economic system evolved to generate an even larger outflow of international migrants, this time consisting of free migrants from Europe rather than enslaved persons from Africa. The new economic system was industrialism, which entailed the burning of fossil fuels to power machines staffed by a host of unskilled workers organized to perform specialized tasks under a new division of labor. Its characteristic ideology was *laissez-faire* capitalism, which eschewed tariffs and trade restrictions in favor of open markets and free international movement. Liberal political philosophers argued that wealth was best created by private individuals and firms relying on the “invisible hand” of the market to allocate capital to its best

and highest uses, to match labor supplies to employer demand, and to bring goods and services efficiently to consumers through markets that let competition equilibrate prices (Kanth, 1986).

The industrial revolution began in Britain in the early nineteenth century, spread to Western Europe in the mid-1800s before moving northward into Scandinavia, eastward into Russia, and southward into Mediterranean nations (Massey, 2005). In the mid-nineteenth century industrialization jumped overseas to the United States and Canada, moving later to Argentina and Brazil, before finally arriving in Australia and New Zealand around 1900. As industrialization spread geographically from nation to nation in densely settled Europe, it generated large outflows of peasants and pastoralists from the countryside as communal lands were enclosed, parcels consolidated, and capital-intensive production methods introduced (Massey, 1988).

Rural dwellers leaving the countryside migrated to urban areas to become part of a growing class of unskilled factory and service workers. However, early industrialism was unstable, regularly going through cycles of expansion and contraction. During downturns in Europe, labor markets in cities were unable to fully absorb workers originating in the countryside and the outflows were redirected to rapidly industrializing former colonies in the Americas and Oceania (Thomas, 1973). Overseas destinations like the United States were characterized by relatively low population densities and a chronic scarcity of workers, yielding high wages relative to those in Europe (Hatton & Williamson, 1998).

The resulting wage gap powered recurring cycles of emigration from Europe during the nineteenth and early twentieth centuries (Thomas, 1941). Periods of economic growth in European nations coincided with periods of recession in former colonies, yielding surges of internal migration toward cities during boom times in Europe followed by alternating waves of international migration overseas during recessionary times in Europe (Thomas, 1973). The oscillating outflows grew in number and frequency between 1800 and 1914 (Williamson, 2004a). Although the outflows resumed somewhat in 1919, they never returned to pre-war levels, owing to a widening political reaction against globalization. Seeking to promote national autarky rather than global economic integration, nations imposed restrictive quotas on immigrants, heavy tariffs on imports, and barriers to the mobility of capital (Timmer & Williamson, 1998).

Throughout the nineteenth century and first half of the twentieth, industrialization in Europe and its settler societies in the Americas,



Australia, and New Zealand coexisted with holdover colonial institutions associated with the earlier agrarian and mercantilist eras. China existed as a fading agrarian empire dominated by European “concession” enclaves located in port cities such as Hong Kong, Macau, Shanghai, and Tianjin. The rest of Asia and virtually all of Sub-Saharan Africa were carved into extractive colonies ruled by imperial bureaucrats in Britain, France, Belgium, Portugal, and the Netherlands.

Considerable “international” migration occurred within these colonial systems, most notably in the British Empire. From 1842 to 1924, some 1.3 million emigrants departed British India for locations outside of Asia. Meanwhile, in China, European concessions served as ports of embarkation for some 2.9 million Chinese peasants seeking to escape grinding poverty of the countryside between 1871 and 1901 in search of a better life overseas (Ferenczi & Willcox, 1929: 902, 928).

These flows were small, however, compared to those originating from European nations in the throes of industrialization. The only Asian nation to stave off European colonization and industrialize during the late nineteenth and early twentieth centuries was Japan. As in Europe, industrialization in Japan was associated with mass out-migration, with 1.2 million Japanese exiting between 1868 and 1924, first to the United States and Hawaii; subsequent migration was curtailed to Brazil, Peru, Chile, and various European nations (Ferenczi & Willcox, 1929: 934). Our focus here is on the much larger outflows from Europe as industrialization spread across that continent. Figure 2.1 uses data from Palgrave Macmillan (2013) to plot migrant departures from Europe from 1800 to 1940 using five-year moving averages with the scale indicated on the *y*-axis to the right (see the dashed line).

Over this period more than 71 million emigrants departed Europe for destinations overseas. Around 60% went to the United States, with 10% each going to Canada and Argentina, 7% to Brazil, 3% to Australia, 2% each to New Zealand, Cuba, and Mexico, and 1% to Uruguay. Between 1800 and 1891 the volume of emigration from Europe steadily rose, with notable peaks in 1852 (628,180), 1872 (683,580), and 1891 (931,286). After dropping briefly to 741,520 in 1896, it surged to an all-time high of 1.9 million on the eve of First World War before dropping to 331,120 in 1917. Although emigration surged again to 946,160 in 1922, it fell precipitously thereafter, with only 210,200 departures recorded in 1940, the lowest level observed since 1846. The era of mass European emigration was over, never to return.

## THE LONG INTERREGNUM

Industrialism was revived from 1945 to 1975 under a new system of global trade and investment that was constructed on institutional foundations laid in the wake of the Second World War. Rather than laissez faire capitalism, reconstruction of the postwar global economy drew heavily on a Keynesian ideology. As articulated by the British economist John Maynard Keynes, this ideology assigned national governments and international institutions the role of defining and regulating markets, while also providing generous social welfare benefits to mitigate capitalism's risks and sustain demand during recessions (Eatwell & Milgate, 2011).

Sensing victory over the Axis Powers in 1944, delegates from the Allied nations—including Keynes himself—met in Bretton Woods, New Hampshire, USA, to construct a new institutional framework for global economic growth in the postwar period (Steil, 2013). To ensure international liquidity and the convertibility of currencies, delegates created the International Monetary Fund (IMF); and to provide funds for broad-based economic development around the world, they established the World Bank. In 1945, international delegates met again in San Francisco, California, to establish the United Nations in hopes of forestalling a third world war (Schlesinger, 2003).

In 1948, the United States launched the Marshall Plan, which channeled capital through the World Bank to rebuild the war-torn economies of Europe and Japan, and later to finance economic growth in the developing world (Steil, 2019). Finally, in order to create and manage this new system of global trade and investment, international delegates met in 1947 to create the General Agreement on Tariffs and Trade, a multilateral treaty that established a platform for the gradual reduction of tariffs and other trade barriers. Over eight rounds of negotiations from 1949 to 1994, barriers to international trade were steadily lowered (Narlikar, 2005). The final round of negotiations created the International Trade Organization as a permanent international bureaucracy tasked with enforcing the accepted rules for free trade in goods, commodities, capital, and services.

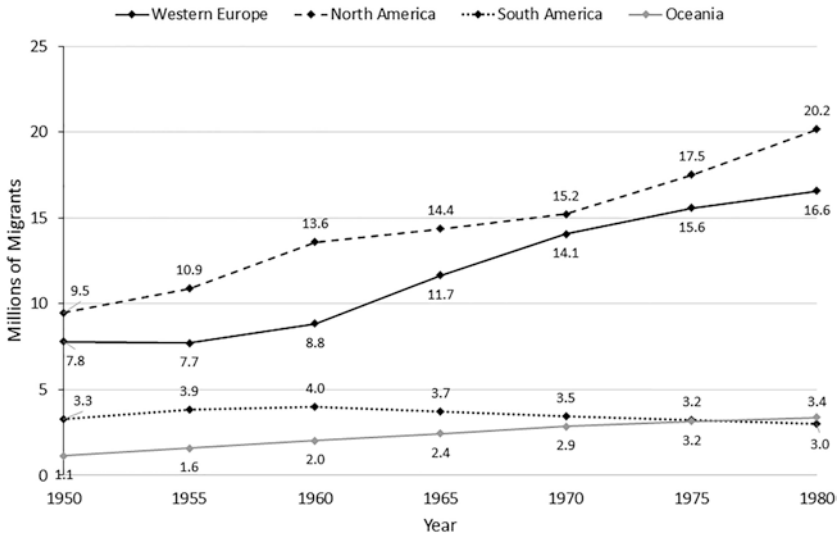
Although a renewed industrial economy was gradually constructed on these institutional foundations during the 1950s and 1960s, it was not truly global. During this period, a “Cold War” pitted the United States and its allies against the Soviet Union and its allies in an ideological struggle between capitalism and communism. After 1945, the Soviet Union imposed centrally planned economies and authoritarian political systems

on nations across Eastern Europe. The communist bloc was further enlarged in 1949 when Mao Zedong founded the People's Republic of China. Despite the schisms of the Cold War, market relations did expand in regions located away from the Soviet and Chinese spheres of influence.

European imperialism finally came to an end through a process of decolonization that unfolded between 1945 and 1980. Over this period, former European colonies progressively won their independence, increasing the number of United Nations member states from 51 to 150 (UN, 2022). As in the first era of industrial globalization, the postwar reboot entailed a rise in international migration, not only to the traditional destinations in Oceania and the Americas, but also to nations within Europe. This shift partly reflected Europe's largely completed process of industrialization and urbanization but also stemmed from decolonization, which generated return flows of European colonists as well as new inflows of former colonial subjects (Miège, 1993).

As a result of declining birth rates, rising incomes, and aging populations, Western Europe after 1960 increasingly became a region of labor scarcity. Although refugees and displaced persons emanating from the Second World War initially sufficed to provide needed workers (Gatrell, 2019), as the Cold War deepened and Winston Churchill's "Iron Curtain" came down, these sources dried up. In response, West European governments adapted by creating guestworker programs (Castles et al., 2014: 104–110). These institutional devices arranged for the entry of workers on temporary visas to work in specific jobs for fixed periods of time at predetermined wages (though durations were often extended and return migration was possible).

Figure 2.2 shows the stock of international migrants defined by place of birth as estimated by the UN Population Division (2022a) from 1950 to 1980 in four key regions of global in-migration: North America (Canada and the United States), South America (Argentina and Brazil), Oceania (Australia and New Zealand), and Western Europe (Belgium, France, Germany, the Netherlands, Sweden, Switzerland, and the United Kingdom). As the graph shows, immigration into Western Europe was flat from 1950 to 1955 as displaced persons and war refugees filled job vacancies. Indeed, the immigrant stock declined slightly from 7.8 million to 7.7 million. Immigration rose from 1955 to 1960, however, as the number of immigrants increased from 7.7 to 8.8 million. Immigration accelerated during the 1960s to reach 14.1 million in 1970, although the increase moderated thereafter. The stock of migrants edged upward from 14.1 to



**Fig. 2.2** Stock of international migrants in four world regions, 1950–1980. *Source:* UN Population Division (2022a), compiled by author

15.6 million between 1970 and 1975, then from 15.6 million to 16.6 million between 1975 and 1980.

The slowing of immigration during the 1970s came in response to the termination of guestworker recruitment during the global economic recession of 1973–1975. However, Europe never returned to an era of low immigration like that which prevailed between 1950 and 1955. Although guestworker migration ended, once the possibility of regular back-and-forth migration disappeared, guestworkers dug in their heels to stay and petitioned for the entry of spouses, children, and other relatives. After 1975, family migration increasingly came to dominate the flow of immigrants into Western Europe (Reichert & Massey, 1982).

Although immigration restrictions implemented in the 1920s were still in place during the 1950s and early 1960s, the immigrant populations of Canada and the United States nonetheless increased steadily throughout the postwar period, rising from 9.5 to 10.9 million between 1950 and 1955 then accelerating to reach 13.6 million in 1960. These increases occurred because immediate relatives of citizens were exempt from numerical limitations and refugees were admitted outside of quotas through

special legislation. Nevertheless, immigration slowed in the 1960s, with the immigrant stock rising from 13.6 million to just 15.2 million over the ensuing decade, an increase of only 12%.

Not included in these figures, however, are agricultural guestworkers who entered Canada (Satzewich, 1991) and the United States (Calavita, 1992) on annual work permits, which peaked in the United States at around 450,000 per year in the late 1950s (Massey et al., 2002). As in Europe, when this category of entry was curtailed at the end of 1964, migration simply shifted to another modality, this time undocumented migration, underscoring the interplay between different categories of migrants, in which reductions in one category simply yield increases in another category, and vice versa. Likewise, the dwindling of undocumented migration to the United States between 2008 and 2018 was accompanied by a concomitant increase in guestworker migration (Wassink & Massey, 2022), while the refusal of the Trump administration to accept applications for asylum at ports of entry after 2016 simply turned asylum seekers into unauthorized border crossers, thus spurring a resurgence of undocumented migration in 2018 and 2019 (Massey, 2020).

In the 1960s, both countries liberalized their immigration laws to expand quotas and eliminate restrictions based on race and nationality. As a result, the stock grew to reach 20.2 million in 1980, an increase of 33% since 1970. Although immigration into the immigrant-receiving nations of South America also rebounded during postwar period, the increases were smaller than those in North America and Western Europe. After 1960, this was insufficient to offset losses from mortality and emigration. In Argentina and Brazil, the immigrant stock declined from four to three million between 1960 and 1980. In contrast, the stock of immigrants in Australia and New Zealand steadily grew, rising by an average of 6.5% per year as the foreign population climbed from 1.1 to 3.4 million between 1950 and 1980.

## INTERNATIONAL MIGRATION IN THE POST-INDUSTRIAL ERA

In the immediate postwar period, the recovering international economy remained industrial in nature, with manufacturing constituting not just the core productive activity but also the principal source of wealth and economic growth. The capitalist economy also was not global in scope. With the Soviet Union and China, along with their client states, relying on a system of state socialism to manage centrally planned economies, huge

segments of the world's population and geography lay outside the capitalist system of international trade and investment. The standoff of the Cold War was ultimately broken not by events in the West but by political developments within China and the Soviet Union, which set the stage for the emergence of a truly global economy during the 1990s, one built on post-industrial rather than industrial foundations.

The first political transformation unfolded in China following Chairman Mao's death in 1976, when his successor Deng Xiaoping led a peaceful transition from a command to a market economy. Chairman Deng progressively used China's powerful authoritarian state to build an institutional structure within which markets could develop gradually alongside the existing command economy, which was dismantled only after market mechanisms had become fully functional (Qian, 2017). Much of the new economy was constructed by small independent entrepreneurs working from below, who innovated institutional solutions drawing on private social networks of funders, suppliers, and distributors to expand and gradually develop markets that operated separately from the state and its institutions (Nee & Opper, 2012). In this way, markets evolved gradually as path-dependent processes, slowly building a capitalist infrastructure to replace communist-era institutions and practices that were ultimately retired as the markets became functional.

In contrast, the transition from a command to a market economy occurred far more abruptly in the Soviet Union and with little planning. Rather than a strong government acting gradually to build market institutions, the Soviet transition stemmed from the sudden collapse of a weak and ineffective state, thereby foisting radical change on an unprepared cadre of bureaucratic leaders (Åslund, 2014). The stagnant Soviet economy and the Kremlin's ossified leadership began to lose control as the digital revolution transformed the economic structure of markets in the West and quickened the pace of change throughout the world. As a result, the Soviet Union found itself losing ground in the global arms race and falling behind the West economically.

Mikhail Gorbachev came to power in 1985 intending to reform the Soviet political economy and in so *perestroika* (restructuring), he authorized state enterprises to pursue foreign trade, sponsored the creation of private banks, and permitted state managers to borrow from the new banks to purchase agencies they headed. Instead of improving economic productivity and efficiency, however, Gorbachev's reforms encouraged challenges to central authority within the Soviet power structure and

enabled discontent to bubble up from below in Warsaw Pact nations (Åslund, 2014).

The Soviet bloc began to crumble in 1989 with the fall of the Berlin Wall, cutting the nations of Eastern Europe free from Russian tethers. In late 1991, the Soviet Union collapsed, releasing its 14 republics from political union with Russia. Rather than unfolding gradually as in China, Russia's turn toward market economics was achieved by means of "shock therapy." Early in 1992, the new post-Soviet government under Boris Yeltsin suddenly ended government subsidies, abolished price controls, and authorized the rapid and full privatization of state enterprises, carried out by former apparatchiks using funds borrowed from newly founded banks.

Thus, the dawn of the twenty-first century witnessed a remarkable transformation: the creation of the world's first truly global market economy. One by one, nations in the Third World gave up their dalliances with socialist economics and joined the World Trade Organization (WTO). China entered in 2001 and Russia followed in 2012. Of the 193 member states in the United Nations, 164 are presently full members of the WTO and another 25 have observer status, comprising 98% of all the nations on earth. This political transformation, however, was accompanied by an even more consequential economic transformation from an industrial to a post-industrial base, a shift hastened by a powerful technological revolution.

Beginning in the mid-1970s, technology began a profound shift away from analog to digital information technologies, creating a global knowledge economy in which economic growth was produced not by economies of scale in the production of goods but by economies of agglomeration in the creation of knowledge within a growing number of "global cities" (Krugman, 1991; Abrahamson, 2004). Digitization increased the pace of social change to bring about a radical reorganization of economic life. Tubes and transistors gave way to silicon chips; land lines led to smart phones; and mechanical adding machines were replaced by hand-held calculators. Warehouses came to house server farms for storing and processing information rather than goods and commodities, while computerized global supply chains enabled rapid, just-in-time, deliveries throughout the world.

As the twentieth century drew to a close, manufacturing shrank as a share of global GDP and the portion devoted to services rose, creating a new political economy dominated by a "creative class" of highly skilled

and educated knowledge workers who were supported by a larger class of workers in labor-intensive service occupations (Florida, 2004). In the course of this economic transition, the reigning political ideology shifted from Keynesianism to neoliberalism. In opposition to the precepts championed by Keynes, neoliberal policy prescriptions entailed reducing the state's role in the economy through government downsizing, privatization, deregulation, tax reductions, as well as the elimination of barriers to international trade and investment (Harvey, 2005). This package of policies came to be labeled the Washington Consensus for its association with neoliberal actors in the US Treasury, the World Bank, and the IMF (Williamson, 2004b).

During the 1980s and 1990s, neoliberal ideology increasingly dominated social and economic policy making in both the developed and developing world, led by economic evangelists in the United States and Britain (Centeno & Cohen, 2012). As in the earlier industrial era, post-industrial global expansion was accompanied by an increase in international migration. The solid line in Fig. 2.3 shows changes in the global stock of international migrants according to the scale indicated on the right vertical axis

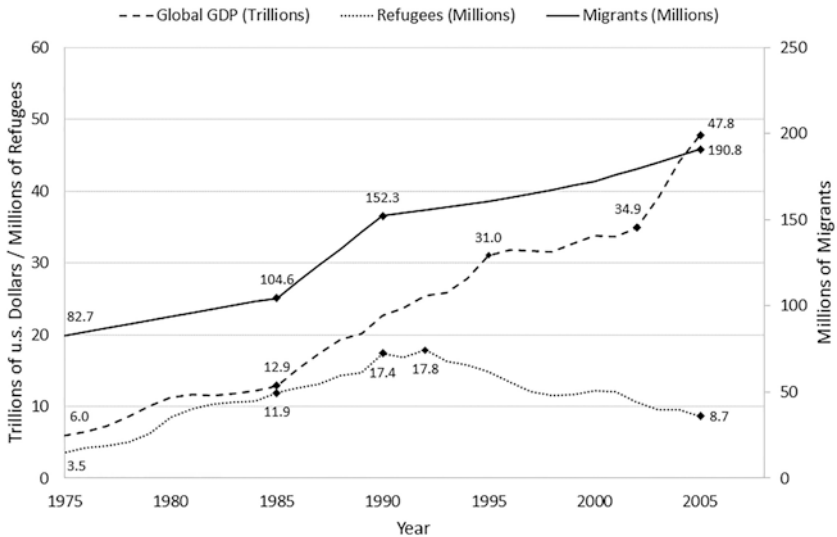


Fig. 2.3 International migrants, refugees, and global GDP at the end of history. *Source:* UN Population Division (2022a), compiled by author



(data from UN Population Division, 2022a). The trend line reveals a sharp spurt in migration after 1985. Whereas the global migrant stock rose from 82.7 to 104.6 million persons from 1975 to 1985 (just 2.2 million per year), from 1985 to 1990 it rose from 105.6 to 152.3 million (9.5 million per year). Growth then settled down to a steady increase of 2.6 million persons per year through 2005, when the global stock of migrants reached 190.8 million.

The peaceful resolution of the Cold War and the promise of political stability was seemingly confirmed by a drop in the global population of refugees after decades of growth during the Cold War. As shown by the dotted line in Fig. 2.3, after rising from 3.5 million in 1975 to 17.4 million in 1990, the number of refugees plateaued and dropped from 17.8 million in 1992 to 8.7 million by 2005 (using data from the UNHCR, 2022a). Consequently, the turn of the millennium was a heady time for western democracies. Not only had the Cold War ended, but refugee populations were also declining and state socialism had been discredited by the collapse of the USSR and China's embrace of market economics. Further, goods, capital, information, services, and commodities were freely flowing across borders in ever greater quantities over shorter periods of time (Friedman, 1999, 2007).

US President George H.W. Bush went so far as to declare a “new world order” defined by “new ways of working with other nations [. . .] peaceful settlement of disputes, solidarity against aggression, reduced and controlled arsenals and just treatment of all peoples” (Nye Jr., 1992: 83). Scholars foresaw a peaceful future in which global governance would occur through a dense web of governmental and nongovernmental people and organizations (Slaughter, 2006). The digital age had created “the world's most prosperous decade” (Stiglitz, 2003), heralding a “new economy” of unlimited growth that would render boom-and-bust cycles of the industrial age a dim memory (Oxford Economics, 2011).

The zeitgeist of the era is best captured by Fukuyama's (1992) proclamation of “the end of history,” by which he meant the end of the ideological struggles that had characterized human affairs since the dawn of the modern era. For Fukuyama, the collapse of the USSR, China's turn toward the market, and globalization under the Washington Consensus signaled “not just the end of the Cold War, or the passing of a particular period of postwar history, but the end of history as such: that is, the end point of mankind's ideological evolution and the universalization of Western liberal democracy as the final form of human government”

(Fukuyama, 1989: 4), a bright future made possible by the paring of “modern liberal democracy and technologically driven capitalism” (Fukuyama, 1992: xii).

## FROM CONSENSUS TO CONFLICT

To paraphrase the American writer Mark Twain, reports of history’s demise are greatly exaggerated. The Washington Consensus proved fleeting, ideological conflicts returned, and history resumed its messy, conflict-ridden course. At the core of neoliberal globalism were a set of inherent contradictions that would soon reveal themselves. The most fundamental internal contradiction was that the architects of twenty-first-century globalization somehow believed they could create an integrated global economy that allowed for the relatively free cross-border movement of all factors of production save one: labor.

Relatively free flows of capital were guaranteed by powerful institutional actors such as the IMF, World Bank, and the SWIFT System (Society for Worldwide Interbank Financial Telecommunications), all relying on binding multilateral agreements to keep money flowing. Likewise, the rules guaranteeing free international trade are enforced by the WTO. In contrast, the management of international migration and labor practices are left to weaker institutions, like the International Organization for Migration and the International Labour Organization. These entities are authorized to monitor flows, measure outcomes, and make policy recommendations, but not to make or enforce policies with respect to immigration policies or labor practices, which are left to individual nation states.

Although national political leaders generally welcome capital investments and look favorably on rising volumes of trade in goods and services, they tend to be wary of immigrants. Despite some liberalization of immigration policies since the 1960s, countries throughout the world continue to place restrictions on the number and characteristics of the immigrants they admit. Workers with skills and education bring valuable human capital into countries seeking a competitive edge in the global knowledge-based economy (Florida, 2005). Although governments may regulate the number of entries by high-skilled workers, they nonetheless support visa programs to facilitate the entry of immigrants bearing human capital (Chiswick, 2011). In contrast, given the surfeit of unskilled workers globally, the same countries strictly limit and control entries by manual workers lacking skills and education (Castles et al., 2014: 215–239).

Consequently, the global labor system is highly segmented, offering multiple and often lucrative pathways to temporary and/or permanent migration for those with technical skills and advanced degrees, but limiting unskilled workers to rigid temporary contracts that offer few or no rights as workers or citizens (Donato & Amuedo-Dorantes, 2020). Such is the situation of migrant workers in the authoritarian monarchies of the Persian Gulf (Hanieh, 2010). In liberal democracies, legal immigrants and skilled guestworkers are often supplemented with a clandestine workforce of unauthorized and vulnerable migrants who work in a shadow sector of irregular, informal labor (Donato & Massey, 2016).

A second structural problem missed by observers in the heyday of the roaring nineties was the very unequal distribution of the costs and benefits generated by economic globalization (Lakner & Milanovic, 2013). When the percentage growth in global income is plotted in percentiles across the global income distribution, the top 1% are seen to receive the bulk of the increase in income witnessed since the 1970s. Those located in the 10th to 50th percentile also made significant gains, enough to pull many in the developing world out of poverty. The fewest gains, however, went to persons below the 10th percentile and those lying between the 50th and 90th percentiles, with the latter being composed mainly of middle- and working-class individuals in the developed world (Alvaredo et al., 2018).

Under post-industrial globalization, in other words, the very poorest have largely been locked out of income growth and the greatest gains went to those with the highest incomes, while the poor in emerging economies such as China and India were lifted out of poverty at the expense of the middle and working classes in Europe and North America (Milanovic, 2016). Increases in the economic insecurity of workers during periods of rapid demographic change from immigration are a well-known formula for sparking nativist, xenophobic reactions (Timmer & Williamson, 1998; Meyers, 2004; Massey, 2020), helping to explain the rise of white nationalist movements in Europe, North America, and elsewhere (Geary et al., 2020). The framing of immigrants as a threat is greatly facilitated, of course, if they are “illegal,” since by definition they can then be labeled as criminals and lawbreakers, thus framed as racialized “others” (Menjívar, 2021).

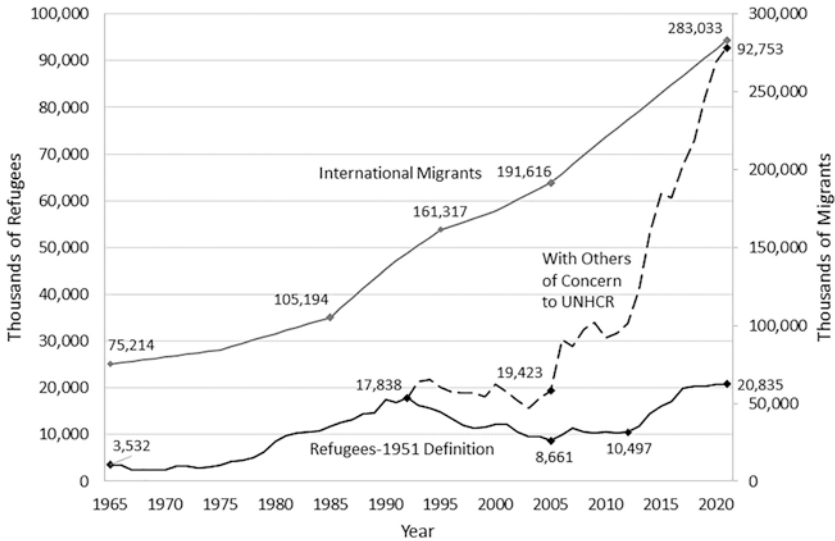
Intergroup tensions are exacerbated by two other unanticipated features of twenty-first-century globalization. First, the optimists of the 1990s failed to realize that globalization was powered by the burning of fossil fuels, which was driving climate change, creating new threats to

societal stability. Second, they failed to appreciate the disruptive social and political effects of the internet and social media in a digitized world (Rahman et al., 2017; Zuboff, 2019; Cosentino, 2020). With climate change comes more variable weather conditions that generate extreme weather events that trigger migration in the short term while producing environmental degradations that yield further displacements in the long run (Perch-Nielsen et al., 2008; Kaczan & Orgill-Meyer, 2020). At the same time, the arrival of “environmental refugees” carries considerable potential to heighten nativist sentiments and intergroup conflict within developed nations during a time of rising inequality and growing economic insecurity.

Climate change also potentially increases the pressures and strains on weak, unstable governments in the developing world, raising the odds of state failure and societal disruptions that trigger still more migration. In a digitized world, the potential for xenophobic reaction is multiplied further by political entrepreneurs using bots and algorithms that make clever use of social media to create political firestorms and moral panics about the purported threats of immigrants and their manipulation by liberal “elites” for nefarious ends that are then reported in the mainstream press (Zhuravskaya et al., 2020).

Thus, Fukuyama’s forecast of an end to history was premature, to say the least. The 2010s demonstrate that the signs of chaos are increasingly prevailing over those of consensus. In addition to rising nativism, xenophobia, and white nationalism, the 2010s also witnessed the emergence of populist politics, the spread of autocracy and authoritarianism, a proliferation of failed states, and the increasing capture of governments by criminal elements (Burgis, 2020). The trend line for refugee migration shown in Fig. 2.3 was somewhat misleading in that it relied on the classic formal definition of a refugee as someone fleeing based on a well-founded fear of being persecuted for reasons of race, religion, nationality, social group, or political opinion. This is an outmoded definition dating back to the early years of the Cold War and taking no account of the manifold sources of forced migration today.

In recent years, many new categories of vulnerable migrants have been added to the list of “persons of concern to the UNHCR,” including asylum seekers, internally displaced persons, stateless persons, and many others, including most recently the multitude of migrants desperately fleeing the societal collapse in Venezuela. Figure 2.4 brings these new categories into the picture, updating information since their addition into UNHCR



**Fig. 2.4** International migrants, refugees, and other persons of concern to the UN High Commissioner for Refugees, 1965–2020. *Source:* Metrocosm (Galka, 2016), compiled by author

statistics began in 1992. As foreseen at the turn of the millennium, the global stock of international migrants continued to climb after 2005, rising by around 50% to reach 283 million persons worldwide in 2020. From 1965 to 2020, the share of international migrants worldwide rose from 2.3% to 3.6% of the global population. However, the continued decline in the number of refugees that had been expected ceased in 2005.

From 2005 through 2012, the number of refugees, as defined by the 1951 Convention on the Status of Refugees, fluctuated around 10 million. Even under that narrow definition, the number then doubled to around 20 million persons between 2012 and 2020, where it remained through 2020. However, once the others of concern to the UNHCR are included in the total, we see that the number of forced migrants reached 20 million in 1993; after 2005 this number shot almost straight upward, reaching 93 million in 2020, the largest number ever recorded. The vision of peaceful globalization defined by orderly flows of international migrants seeking opportunities is fading from view, quite literally (see the visualizations of international migrants versus refugees posted online at [Metrocosm](#), Galka, 2016).

## DRIVERS OF INTERNATIONAL MIGRATION

Since the time of Ravenstein (1885), social scientists have sought to develop a theoretical understanding of human migration. By the early 1990s, theoretical models had proliferated across multiple academic disciplines and, in an effort to develop a common conceptual foundation for studying migration, the International Union for the Scientific Study of Population created the Panel on South–North Migration. Its charge was to undertake a comprehensive review of migration theories and research. The panel published several preliminary reports (see Massey et al., 1993, 1994; Taylor et al., 1996a, 1996b) and later summarized its findings in a comprehensive coauthored book (Massey et al., 1998). The book argues that migration theories proposed up to that point were not inherently contradictory. Indeed, the basic tenets and assumptions underlying each model could all be true, with different models carrying more or less explanatory power depending on the contextual vagaries of time and place, a conclusion later validated by Garip (2016).

In its review of empirical research, the panel consistently found a positive relationship between wage differentials and the rate or volume of international migration, as predicted by Neoclassical Economics (Todaro, 1969) and Human Capital Theory (Sjaastad, 1962). It also found strong evidence that, apart from higher wages, migration could also be motivated by a desire to manage risks to wellbeing by diversifying household labor portfolios, as predicted by the New Economics of Labor Migration (Stark, 1991). The panel likewise concluded that structurally divided labor markets in developed nations created a persistent demand for immigrant workers, as predicted by Segmented Labor Market Theory (Piore, 1979; Portes & Manning, 1986). In developing nations, meanwhile, structural transformations associated with economic development displaced workers from traditional livelihoods to create mobilized populations prone to migrating in search of alternative means of support, as predicted by World Systems Theory (Sassen, 1988).

The foregoing theoretical models offer explanations for how and why migration is initiated, but no matter how migratory flows originate, they tend to persist and expand over space and time via various self-feeding mechanisms, the most important of which is the accumulation of social capital through the extension of migrant networks, as predicted by Social Capital Theory and the Theory of Cumulative Causation (Massey, 1990). Finally, although population growth does not directly drive migration (see

Zlotnik, 2004), it is nevertheless important in assessing migratory potential because it shapes a population's size and age structure (Preston & Coale, 1982). Size determines the number of people at risk of migration and, hence, the number of possible migrants, while migration itself is inherently age-dependent, concentrated in the young labor force, aged 18 to 30, and especially among men (Rogers & Castro, 1981). Further, the initial migration of working-age males often triggers later outflows by spouses, children, and other dependents, for purposes of both work and family reunification.

Another problem is that most of the theories of migration developed so far theorize it as a voluntary decision undertaken to increase individual or family wellbeing. Regardless, history is replete with examples of forced migration: movements triggered not by attractions at points of destination but by threats at places of origin (see Becker, 2022). However, as Becker and Ferrara (2019: 2) point out, "it is important to note that the distinction between voluntary and forced migration is by no means a binary one." Indeed, "the two extremes of completely voluntary and forced migration mark two ends of a spectrum, where the former typically ignores physical threats, and the latter considers force the determining factor" (Becker & Ferrara, 2019: 13). The impact of both forced and voluntary migrants on sending and receiving societies depends, of course, on rates of return migration, which are generally lower for forced migrants, but with considerable variance across specific historical cases (Becker, 2022).

Building on earlier work by Massey et al. (1998) and Carling (2002) as well as drawing on concepts articulated by Berlin (1969) and Sen (1999), de Haas (2021: 25) offers a consolidated model that incorporates both threats and attractions into migration decision-making. He sees migration decisions as occurring within a dynamic, multilevel context in which people observe positive and negative features of the structural circumstances prevailing at places of origin in comparison to the plusses and minuses of opportunity structures at places of destination. Then, considering their own aspirations and capabilities (which may be endogenously shaped by the origin context), rational actors decide whether to leave or stay.

The migration decision then feeds back to influence each actor's future capacities and aspirations; subsequently, when combined with the individual migration decisions taken by many others, the structural circumstances at the places of origin and destination are also altered. The negative features of the origin context that de Haas (2021: 24) specifically mentions include "obstacles, barriers, or constraints [...] on people's freedom

or even [...] outright threat[s] to people's lives, for instance through regulation, oppression, violence, or war." To this list of maladies, one must add threats linked to global climate change: extreme weather events, wildfires, floods, famines, and environmental degradation.

To assess the potential for international migration in the coming decades, this chapter undertakes a region-by-region survey of factors deemed by extant theories to predict emigration and immigration. The factors considered fall under four broad rubrics—demographics, economics, climate, and governance—and the regions examined are categorized by level of development. The specific developing and developed nations included in each region are listed alphabetically in Appendix A (Tables 2.5 and 2.6). Regional classifications generally follow those used by the United Nations Sustainable Development Programme, with several notable departures. For example, the oil-rich nations of the Gulf Cooperation Council are extracted from the rest of West Asia and placed into a separate category within the developed world. Likewise, Australia and New Zealand are categorized separately from other nations in Oceania which are considered under the heading South Pacific (though some of the smaller island nations located there as well as in the Caribbean are excluded for lack of data).

East Asia is here classified as a developed region anchored by China, given the size of its economy and its rapid ascent into the ranks of middle-income countries. In addition to China proper, the region also contains Hong Kong, Macau, Taiwan, South Korea, and Japan, all clearly developed entities. Although North Korea and Mongolia are clearly not developed, they are nonetheless included in the region. Owing to their small size, their presence has no significant effect on the value of regional averages, which are computed by weighting each country's contribution according to its population size.

### *Demographic Indicators*

Table 2.1 begins the analysis by offering a demographic profile of the world's principal regions circa 2019 using data from the UN Population Division (2022b). Although, as noted above, population growth does not have a direct effect on international migration, it strongly influences migratory potential through its effect on population size. Column (1) considers the total number of inhabitants in each region and uses boldface to highlight those with populations at or above the global average (shown



Table 2.1 Demographic characteristics of selected world regions circa 2019

Region	(1) Population (Millions)	(2) Total Fertility Rate	(3) Growth Rate	(4) Median Age	(5) Child Dependency Ratio	(6) Elder Dependency Ratio
<b>Developing world</b>	<b>1093</b>	<b>4.8</b>	<b>2.7</b>	<b>18.8</b>	<b>121.4</b>	<b>6.7</b>
Sub-Saharan Africa	245	3.3	1.9	25.7	78.9	10.8
North Africa	221	2.8	1.6	27.2	72.7	11.8
West Asia	74	2.7	1.6	27.6	66.9	9.4
Central Asia	1940	2.4	1.2	27.7	64.8	10.7
South Asia	669	2.2	1.1	30.5	56.7	11.8
Southeast Asia	39	2.3	0.7	31.6	58.5	16.3
Caribbean	180	2.2	1.2	28.2	63.5	12.7
Central America	431	1.9	0.9	32.1	51.2	15.9
South America	11	3.5	1.9	22.9	88.0	7.7
<b>Developed world</b>						
Australia–New Zealand	30	1.8	1.2	37.9	43.3	27.8
East Asia	1654	1.7	0.4	39.3	35.7	21.2
Gulf Coop. Council	59	2.2	2.0	32.2	40.2	4.3
Eastern Europe	293	1.7	-0.1	40.7	35.4	27.4
Northern Europe	106	1.7	0.5	40.8	39.6	32.7
Southern Europe	152	1.3	-0.1	45.4	31.4	35.9
Western Europe	196	1.7	0.4	43.9	36.2	35.9
North America	369	1.8	0.7	38.6	41.5	28.5
Global Average	431	2.3	1.1	32.8	57.0	18.2

Source: UN Population Division (2022b), compiled by author

Note: bold figures indicate elevated propensities for emigration (or immigration in the case of the elder dependency ratio)

at the bottom of the table), thus signaling an elevated demographic potential for out-migration under the right social and economic circumstances.

The standout regions in the developing world are South Asia (with 1.9 billion inhabitants) and Sub-Saharan Africa (1.1 billion), followed by Southeast Asia (669 million) and South America (431 million). Both South Asia and Southeast Asia are dominated by a few very large countries. In the former case, the nations are India (1.3 billion), Pakistan (199 million), and Bangladesh (146 million). In the latter case, they are Indonesia (258 million), the Philippines (102 million), and Vietnam (93 million). In contrast, Sub-Saharan Africa includes 47 different countries, the largest of which is Nigeria at 181 million. South America contains 12 nations, with Brazil being the largest at 204 million. In the developed world, the largest population is found in East Asia (1.7 billion), which is dominated by China (1.4 billion), followed at a distance by Japan (128 million), South Korea (51 million), with North Korea and Mongolia trailing far behind with just 25 million and 3 million inhabitants, respectively.

The next two columns in Table 2.1 present regional averages for the total fertility rate (TFR) and the population growth rate. Given their large size, India and China naturally carry great weight in computing the regional averages for South and East Asia, respectively. In general, the higher a region's TFR, the greater is its expected growth rate, as births are generally the most important contributor to the rate of natural increase. Indeed, the correlation between fertility and growth rates across nations in 2019 was 0.875. TFR values above the global average of 2.3 children per woman are in bold, as they have growth rates above the global average growth rate of 1.1%, indicating regions of high fertility and rapid population growth.

Sub-Saharan Africa is clearly the world's most fecund and rapidly growing region with a TFR of 4.8 and a growth rate of 2.7% per year. This rate translates into a population doubling time of 26 years; a demographic forecast indicates that in 2100 the region's population will be 3.1 billion and still not have peaked (see Vollset et al., 2020). In terms of growth potential, Sub-Saharan Africa is followed by Oceania, with 3.5 children per woman and a growth rate of 1.9% per year. The latter figure implies a doubling time of 37 years and a population forecast of 34 million and still growing in 2100. Next comes North Africa, where the respective values are 3.3 and also 1.9%, yielding a projected population of 2.1 billion in 2090 (Vollset et al., 2020).

With respective TFRs of 2.8 and 2.7, West Asia and Central Asia share a growth rate of 1.6% and a doubling time of 44 years and are forecast to continue growing through most of the century before peaking in 2077 and 2091, respectively. Elevated fertility and growth rates are also observed in South and Southeast Asia, with growth rates of 1.2 and 1.1%, respectively, with both regions expected to peak in the mid-twenty-first century. India's population is forecast to peak at 1.6 billion in 2048, surpassing China's peak population of 1.41 billion forecast to be reached in 2024 (Vollset et al., 2020). Although the Caribbean region displays an above-average TFR of 2.3 children per woman, its growth rate is only 0.7% owing to emigration from small island nations. Nevertheless, it is forecast to peak at 50.3 million in 2040. Australia–New Zealand conversely displays an above-average growth rate but a below-replacement TFR of just 1.8, reflecting the effect of immigration, yielding a peak population of 40.4 million persons around the year 2095 (Vollset et al., 2020).

Fertility and population growth also influence migration by determining a population's age structure. As birth rates fall and growth declines, population aging occurs and the median age rises, as seen in the fourth column of Table 2.1 (which displays a correlation of  $-0.891$  with both the TFR and the growth rate). Age is important because migration is dominated by people aged 18 to 30, most of whom are moving for work or who are socially connected to a migrant worker (Rogers & Castro, 1981). The rate of out-migration for labor rises sharply in the late teens, peaks at age 22 or 23, and then declines rapidly by age 30 and remains low thereafter.

In Column (4), median ages below the global average of 32.8 are bolded to indicate regions where the age distribution is exceptionally favorable to out-migration. All developing world regions have median ages below this threshold, indicating a strong potential for migration. That potential is greatest in Sub-Saharan Africa (with a median age of 18.8), followed by Oceania (22.9) and North Africa (25.7). Next comes West Asia, Central Asia, South Asia, and Central America (with median ages in the range of 27–28), followed by Southeast Asia, the Caribbean, and South American (age range of 30–32). All developed regions display median ages above the global average, with the sole exception of the Gulf Cooperation Council, which has a median age of 32.2, just below the threshold of 32.8.

Age composition is important for migration not only because of its effect on median age but also because of its effects on the degree of

dependency in the population as a whole, here indexed by the child dependency ratio ( $P_{0-14}/P_{15-64} * 100$ ) and the elder dependency ratio ( $P_{65+}/P_{15-64} * 100$ ). These ratios provide information about the likely motives for migration and the direction of the resulting flows (inward or outward). A high child dependency ratio, for example, indicates a burden on workers who must provide for young children too young to work, whereas a high elder dependency ratio signals a burden on workers to provide for older persons who have retired from the labor force. Thus, a high child dependency ratio incentivizes out-migration whereas a high elder dependency ratio incentivizes in-migration.

Bearing these points in mind, Columns (5) and (6) highlight ratios above the respective global averages for child and elder dependency to reveal a complementary pattern. All developed regions display child dependency ratios below the global average. Conversely, with just two exceptions (Southeast Asia and South America), all developing regions have child dependency ratios below the average, indicating strong demographic incentives for out-migration. The incentives for out-migration are by far the greatest in Sub-Saharan Africa (with a child dependency ratio of 121.4), followed by Oceania (88.0), North Africa (78.9), and West Asia (72.7). Next in descending order are Central Asia (66.9), South Asia (64.8), Central America (63.5), and the Caribbean (58.5).

In contrast, all developing regions have elder dependency ratios below the global average and, with one exception, all developed regions have elder ratios above the average, suggesting strong incentives for in-migration. The one outlier is the Gulf Cooperation Council, which essentially controls its own dependency ratio by specifying the number of guestworkers it recruits into the population at any point in time. Elsewhere in the developed world, the elder dependency ratios favor in-migration, especially in Southern and Western Europe where both elder dependency ratios are 35.9, followed by Northern Europe at 32.7 and Eastern Europe at 27.4. In North America and Australia–New Zealand the respective ratios are 28.5 and 27.8.

In East Asia, the elder dependency ratio is only 21.2, a low value that reflects the great weight assigned to China in computing the regional average. In China, the elder ratio is just 18.5 (barely above the global average) and much closer to those that prevail in the developing world. Given its size, China's exceptionally low level of dependency effectively counterbalances Japan's truly extreme elder dependency ratio of 52.0, by far the world's highest (the ratio is 23.6 in South Korea but only 14.7 in North

Korea). However, owing to China's one-child policy, which prevailed from 1980 through 2016, it is about to enter a period of rapid population aging (Feng et al., 2012) after reaching a peak population as early as 2024 (Vollset et al., 2020).

### *Economic Indicators*

Table 2.2 draws on data from the World Bank (2022) to present key economic indicators by region and level of economic development. The first column shows regional averages of GDP per capita in current US dollars (USD) adjusted for purchasing power parity, with values below the global average highlighted in boldface. A quick glance reveals that all regions in the developing world have per-capita GDPs below this threshold and that

**Table 2.2** Indicators of economic conditions in selected world regions circa 2019

	(1)	(2)	(3)	(4)
	GDP per Capita	Employment Population Ratio	Change in E/P Ratio	Inflation Rate
<b>Developing world</b>				
Sub-Saharan Africa	<b>\$4016</b>	61.9	-0.4	11.0
North Africa	<b>\$10,185</b>	37.9	-0.7	13.6
West Asia	<b>\$17,603</b>	40.9	-0.2	9.8
Central Asia	<b>\$12,400</b>	54.2	-1.3	9.7
South Asia	<b>\$6769</b>	44.7	-0.7	6.2
Southeast Asia	<b>\$12,801</b>	63.7	-0.1	3.0
Caribbean	<b>\$12,276</b>	53.8	1.7	7.3
Central America	<b>\$17,839</b>	53.9	1.2	3.5
South America	<b>\$15,363</b>	52.6	-1.3	2.9
South Pacific	<b>\$5881</b>	48.9	-0.2	3.2
<b>Developed world</b>				
Australia–New Zealand	\$51,069	61.5	1.4	1.6
East Asia	<b>\$19,605</b>	63.3	-1.2	2.6
Gulf Cooperation Council	\$53,032	59.5	-0.4	-1.5
Eastern Europe	\$27,767	54.9	0.6	4.5
Northern Europe	\$52,061	59.4	1.6	1.7
Southern Europe	\$38,920	46.2	3.4	0.7
Western Europe	\$54,933	55.2	1.5	1.4
North America	\$63,767	56.5	1.5	1.8
Global Average	\$24,461	53.8	0.3	3.3

Source: World Bank (2022), compiled by author

Note: bolded figures indicate elevated propensities for emigration

all developed regions, save one, have per-capita GDPs above it. East Asia is again the one exception, thus reflecting China's low per-capita GDP of USD 16,847, attributable to the recency of its development. However, in China's special economic zones of Hong Kong and Macao, the respective GDPs per capita are USD 62,567 and USD 129,428, followed by values of USD 48,638 in Taiwan, USD 42,338 in Japan, and USD 42,728 in South Korea. The comparable averages for Mongolia and North Korea are just USD 12,838 and USD 1700, but they have little influence on the population-weighted regional average.

China notwithstanding, GDPs per capita in all developed regions exceed those in all developing regions, indicating pervasive and strong material incentives for international migration from the developing to the developed world for purposes of either income maximization or risk diversification. The gap in GDP per capita ranges from USD 1766 (between Central America and East Asia) to USD 59,752 (between Sub-Saharan Africa and North America). Taking geographic proximity into account, we see that the potential gains from international migration are quite large within certain migration corridors. In the Western Hemisphere, for example, moves to North America from Central America, South America, and the Caribbean yield potential gains of USD 45,929, 48,405, and 51,492, respectively. In the Afro-European corridor, moves to Western Europe from North Africa and Sub-Saharan Africa yield potential gains of USD 44,748 and 50,918, respectively. Likewise, in the South Pacific corridor moves to Australia–New Zealand from Oceania, South Asia, and Southeast Asia yield gains of USD 45,188, 44,299, and 38,267, respectively.

Earnings only matter if jobs are available, of course, and the second column in Table 2.2 presents regional employment-to-population ratios (Employed Persons/Population  $\geq 15 \times 100$ ), with E/P values below the global average once again highlighted boldface. In general, jobs are relatively scarce in the developing world, where six of the ten regions have E/P ratios below the global average. The lowest ratios are observed in North Africa, West Asia, and South Asia, with respective ratios of 37.9, 40.9, and 44.7, followed by Oceania at 48.9 and South America at 52.6. The only developed region with an E/P ratio below the global average is Southern Europe with a value of 46.2.

Perhaps more important than the value of the E/P ratio itself is its change over time: the third column shows changes in the ratio between

2015 and 2019. With respect to this measure, Southern Europe is again an outlier, but in the opposite direction. Although it may have had the lowest E/P of any region in the developed world, with a value of 3.4, it displays the greatest increase in the E/P ratio observed in the table. The most notable finding, however, is the preponderance of negative E/P change scores in the developing world. Across its ten regions, eight have negative E/P change scores, meaning that job growth is not keeping up with population growth.

The degree of change in the negative direction is greatest in Central Asia and South America, both with scores of -1.3, followed by North Africa and South Asia with a common change score of -0.7, and then by Sub-Saharan Africa (-0.4), West Asia and Oceania (both -0.2), and finally Southeast Asia (-0.1). In contrast, only two nations in the developed world show negative E/P change scores: the Gulf Cooperation Council (-0.4) and East Asia (-1.2). As already noted, E/P ratios are under the direct control of GCC governments through their labor recruitment policies. The negative change score in East Asia likely reflects the slowing of economic growth owing to the aging of workers in China and Japan.

The final economic index we consider is the rate of inflation, which captures the rapidity with which a currency devalues over time. It is presented in Column (4), with values above the global average of 3.3% highlighted in bold. High rates of currency devaluation create havoc in any economy, making sound financial planning difficult and decisions about investment and spending precarious, creating incentives for migration to regions where wages are likely to hold their value over time.

Where only one developed region displays an inflation rate above the global average (Eastern Europe at 4.5%), seven developing regions exceed this threshold. Currency inflation is greatest in North Africa, where the rate of 13.6% means that every 5.4 years consumers need two times more currency units to maintain the real value of their incomes. It is followed by Sub-Saharan Africa with a rate of 11.0%, yielding a value half-life of 6.6 years. Next in descending order are West Asia and Central Asia with respective rates of 9.8% and 9.7%, indicating half-lives of around 7.5 years. Although not as dire as the aforementioned examples, the rates of 7.3 and 6.2 in the Caribbean and South Asia are also quite high, yielding value half-lives in the range of 10–12 years.

### *Climate indicators*

The first three columns in Table 2.3 draw on climate indicators developed by researchers associated with the Notre Dame Global Adaptation Initiative (ND-GAIN, 2022). Column (1) shows regional values for an index assessing a region's vulnerability to climate change in six life-supporting sectors: food, water, health, ecosystems, habitat, and infrastructure. Each sector is represented by six indicators capturing the degree of exposure to climate-related hazards, its sensitivity to the effects of those hazards, and its capacity to cope with those effects (Chen et al., 2015). Across nations, the vulnerability index varies from a minimum of 24.9 to a high of 67.7, with a global average of 39.2. The indices in bold indicate that all ten developing regions display above average climate vulnerability, whereas no developed nation's ratio exceeds it.

Column (2) shows regional values for an index of climate change readiness constructed to assess a nation's readiness to make effective use of investments in three domains to adapt to the challenges of global climate change. *Economic readiness* assesses the degree to which local economic conditions are able to facilitate private sector investments to mitigate. *Government readiness* considers a nation's institutional capacity to provide high-quality, reliable public services. *Social readiness* assesses the degree to which societal arrangements are capable of sustaining efficient and equitable investments (Chen et al., 2015). Across nations, the readiness index varies from 14.0 to 80.5, with a global average of 46.4. As the bolded indices again reveal, all developing world regions have readiness indices below this average, but all developed nations exceed it.

Column (3) shows values of an adaptability index created to assess the balance between the climate threats facing a region and the resources available to mitigate them. The index is computed by subtracting the vulnerability index from the readiness index and then rescaling the resulting values from 0 to 100. In the table, adaptability scores below the global average of 53.4 are in bold, revealing that all developing regions have scores below this threshold while all those in developed regions are above it. While regional indices range from 56.5 to 70.1 in the developed world, in the developing world they range from 37.8 to 51.5.

The lack of any overlap between developing and developed regions means that migration from the developing to the developed world in response to climate change necessarily yields an increase in adaptability, no



Table 2.3 Climate change and governance indicators, selected world regions circa 2019

	Climate Change			Governance			
	(1)	(2)	(3)	(4)	(5)	(6)	(7)
	<i>Vulnerability Index</i>	<i>Readiness Index</i>	<i>Adaptability Index</i>	<i>Fragile States Index</i>	<i>Rule of Law Index</i>	<i>Human Rights Index</i>	<i>Homicide Rate</i>
<b>Developing World</b>							
Sub-Saharan Africa	53.2	28.6	37.8	92.2	44.2	42.2	15.3
North Africa	44.9	34.0	44.6	86.5	44.9	25.9	3.5
West Asia	40.6	39.0	49.2	89.6	64.0	28.6	4.2
Central Asia	37.0	39.9	51.5	72.1	45.3	14.2	2.5
South Asia	50.4	34.6	42.1	79.0	51.0	62.8	3.1
Southeast Asia	45.7	38.7	46.5	73.6	52.2	47.8	2.1
Caribbean	45.1	32.2	43.6	72.6	49.6	46.1	11.3
Central America	41.3	36.0	47.3	70.3	44.5	61.4	28.0
South America	39.3	35.8	48.3	68.6	45.6	71.2	21.0
South Pacific	51.8	30.9	39.5	76.7	NA	65.8	8.2
<b>Developed World</b>							
Australia–New Zealand	30.2	70.4	70.1	19.8	50.6	98.0	0.9
East Asia	38.7	54.9	58.1	67.4	49.7	20.0	0.6
Gulf Coop. Council	38.4	51.4	56.5	60.8	80.3	13.2	1.0
Eastern Europe	32.9	51.6	58.8	64.6	52.1	45.7	5.5
Northern Europe	29.3	69.7	70.2	31.6	81.1	94.7	1.3
Southern Europe	31.7	52.3	60.3	44.8	65.7	87.9	0.7
Western Europe	29.1	68.0	69.5	27.1	80.1	93.3	1.0
North America	31.8	66.3	67.3	36.2	72.9	87.3	4.6
Global Average	39.2	46.4	53.4	63.0	56.1	55.9	6.4

Source: ND-GAIN (2022), compiled by author

Note: bolded figures indicate elevated propensities for emigration

matter which developing region or which developed destination one considers. Potential increases in the adaptability index range from 5.0 to 32.3 points. Once again taking global geography into account, we see that migration to North America from Central America, South America, and the Caribbean yield respective increase in the climate adaptability index of 19.9, 19.0, and 23.7 points. Likewise, migration to Western Europe from North Africa and Sub-Saharan Africa yield respective gains of 24.9 and 31.7. In the South Pacific, movement to Australia–New Zealand from elsewhere in the South Pacific, Southeast Asia, or South Asia produces respective gains of 30.7, 23.6, and 28.1 points.

### *Governance Indicators*

The final four columns in Table 2.3 address different facets of a region's capacity to govern effectively and stably. Column (4) presents regional averages for the Fragile States Index, as created by the Fund for Peace (2020). It draws on three sources of information to develop separate indicators of fragility owing to societal divisions, poor economic performance, political instability, and social disequilibrium. The three data sources include content analyses of media articles and research reports collected from over 10,000 different English-language sources around the world, quantitative datasets prepared by international and multilateral statistical agencies, as well as qualitative reviews of the state of affairs within each country by a team of social scientists. These data sources are used to generate multiple quantitative indicators along 12 different dimensions of state instability: security threats, elite factionalization, group grievances, economic decline, uneven development, human flight/brain drain, state legitimacy, quality of public services, human rights/rule of law, demographic pressures, the presence of refugees and displaced persons, and external interventions (for details see Fund for Peace, 2022).

The resulting composite indices were averaged by region to derive the fragile state measures reported in Column (4). Empirically, across countries, the fragile states index ranges from 16.9 to 113.5 with an average of 63.0. The values in bold in the third column highlight that all developing regions display index values above this threshold, whereas only two developed regions do so. Nevertheless, all developed regions display fragility indices below any of those in the developing world, with the differential ranging from 1.2 points (between East Asia and South America) to 72.4

points (between Sub-Saharan Africa and Australia–New Zealand). Once again taking geography into account, we note the large gains in state stability to be had by moving to North America from Central America, South America, and the Caribbean (34.1 points, 32.4 points, and 36.5 points, respectively), as well as to Western Europe from North Africa, Sub-Saharan Africa, and Central Asia (59.4 points, 65.1 points, and 62.5 points) and to Australia–New Zealand from the South Pacific, Southeast Asia, and South Asia (57.0 points, 53.9 points, and 59.3 points).

Column (5) continues the analysis by presenting regional averages for a Rule of Law Index developed by the World Justice Project (2022). This index is based on multiple indicators compiled in eight separate categories: constraints on government powers, degree of corruption, openness of government, respect for fundamental rights, degree of order and security, capacity for regulatory enforcement, and degree of access to civil and criminal justice. Scores and rankings in the eight categories and 44 sub-categories draw on two sources of data: a general population survey conducted on a representative sample of 1000 respondents in each country plus a targeted survey of in-country legal practitioners, experts, and academics with expertise in different sectors of the law—commercial, constitutional, civil, criminal, labor, and public health (World Justice Project, 2021).

The resulting index rates the rule of law on a scale ranging from 28 to 90 with an average value of 55.6. In the table, values below this average are highlighted to indicate low access to the rule of law. Apart from in Australia and New Zealand, the World Justice Project collected no other data in Oceania, so an index for the South Pacific is unavailable. Among the remaining regions, measures of the rule of law in the developing and developed worlds overlap to a considerable degree. Index values range from 44.2 to 64.0 across developing regions and from 49.7 to 81.1 across developed regions. As a result of this overlap, not all moves between developing and developed regions yield increases in the rule of law. Nevertheless, taking geography into account the improvements are quite large in some migration corridors. A move to North America from Central America, South America, and the Caribbean, for example, yields respective rule-of-law gains of 28.4 points, 27.3 points, and 23.3. Similarly, a move to Western Europe from North Africa, Sub-Saharan Africa, or Central Asia would yield potential gains of 35.2, 35.9, and 16.1 points, respectively.

The next facet of governance addressed in Table 2.3 is the degree of respect for human rights, as measured by an index developed by Freedom

House (2022). The index, presented in Column (6), is based on data assembled and evaluated by a panel of external analysts, expert advisers, and regional specialists who relied on “a combination of on-the-ground research, consultations with local contacts, and information from news articles, nongovernmental organizations, governments, and a variety of other sources” to generate a consensus index for each country (Repucci & Slipowitz, 2022). The index ranges from a score of 0 (Yemen) to 100 (Finland, Norway, and Sweden) with a global average of 55.9.

Index values below this threshold are highlighted to indicate regions characterized by notably weak protections for human rights, yielding bolded indices in six of the ten developing regions and three of the eight developed regions. In the former region, the index is remarkably low in Central Asia (14.2), North Africa (25.9), and West Africa (28.6), and somewhat higher but still below average in Sub-Saharan Africa (42.2), the Caribbean (46.1), and Southeast Asia (47.8). In the developed world, index values are similarly very low in the Gulf Cooperation Council (13.2) and East Asia (20.0) and only a bit higher in Eastern Europe (45.7).

In the developing world, respect for human rights is greatest in South America (71.2), Oceania (65.8), South Asia (62.8), and Central America (61.4). In the developed world, the human rights index is very high in Australia–New Zealand (98.0), Northern Europe (94.7), and Western Europe (93.3), and only slightly lower in Southern Europe (87.9) and North America (87.3). Given the substantial overlap in the range of index values across developing and developed regions, once again not all moves between the regions would bring an improvement in respect for human rights.

Nonetheless, migration within salient regional corridors potentially yields sizeable gains in the human rights index. Thus, migration into North America from Central America, South America, and the Caribbean generate respective gains of 25.9 points, 16.1 points, and 42.2 points, while movement into Western Europe from North Africa, Sub-Saharan Africa, and Central Asia would yield gains of 67.4 points, 51.1 points, and 64.7 points, respectively. Likewise, movement into Australia–New Zealand from the South Pacific, Southeast Asia, and South Asia would bring gains of 32.2 points, 50.2 points, and 35.2 points, respectively.

The final column in Table 2.3 assesses exposure to violence by presenting homicide rates per 100,000 population, as tabulated by the UN Office on Drugs and Crime (UNODC, 2022). Rates above the regional average are highlighted in bold, revealing three distinct regions of elevated lethal

violence: Latin America, Sub-Saharan Africa, and the Caribbean. Central America is by far the most lethal region with a homicide rate of 28.0 homicides per 100,000 population, followed by South America with a rate of 21.0 per 100,000, Sub-Saharan Africa (15.3 per 100,000), and, lastly, Oceania (8.2 per 100,000).

In the rest of the developing world, no rate exceeds 4.2 per 100,000 and in the developed world the highest observed rate is 5.5 per 100,000, with the lowest being 0.6 per 100,000 in East Asia. Again, the degree of overlap in the range of homicide rates in the developing and developed worlds means that not all moves between the two regions would yield a sharp decline in the risk of homicide. The greatest potential reduction in lethal violence comes from migration into North America from regions elsewhere in the Americas. Moving northward from Central America entails a decline of 23.4 points in the rate of homicide, and migration from South America and the Caribbean to North America reduce the murder rate by 16.3 and 6.6 points, respectively. Rising violence can also trigger changes in other drivers of migration, as illustrated by global rise in inflation induced by Russia's invasion of Ukraine in 2022.

## THE PRESENT AND THE FUTURE OF INTERNATIONAL MIGRATION

Table 2.4 offers a schematic summary of the regional propensities toward emigration in the world today. It arrays risk factors predicting greater out-migration in columns delineated across the top, with regions listed in rows down the side in descending order of migration risk. An X is placed in each cell whenever the corresponding indicator was highlighted in Tables 2.1, 2.2, and 2.3. The number of X values given to each region is totaled in the final column to the right. Very clearly, the pressures for out-migration are greatest in Sub-Saharan Africa, which contains an X in each of the 11 possible risk cells. The proliferation of risk factors is especially meaningful in this region given its population of nearly 1.1 billion and the fact that it is projected to reach 3.1 billion by the year 2100.

Next on the list is South Asia, with a total of nine risk factors. Although North Africa, Central Asia, and the Caribbean also exhibit the same number of risk factors, with a population of 1.9 billion, South Asia clearly has the greatest potential for out-migration after Sub-Saharan Africa, followed by North Africa (245 million), Central Asia (74 million), and the Caribbean (39 million). Combining the populations of North and Sub-Saharan

**Table 2.4** Assessment of potential for out-migration from selected world regions

<i>Region</i>	<i>Large Population</i>	<i>Low Median Age</i>	<i>High Child Dependency Ratio</i>	<i>Low GDP per Capita</i>	<i>Declining E/P Ratio</i>	<i>High Inflation Rate</i>	<i>Low Climate Adaptability</i>	<i>High State Fragility</i>	<i>Low Rule of Law</i>	<i>Weak Human Rights</i>	<i>High Homicide Rate</i>	<i>No. of Risk Factors</i>
Sub-Saharan Africa	X	X	X	X	X	X	X	X	X	X	X	11
South Asia	X	X	X	X	X	X	X	X	X			9
North Africa	X	X	X	X	X	X	X	X	X	X		9
Central Asia	X	X	X	X	X	X	X	X	X	X		9
Caribbean	X	X	X	X		X	X	X	X	X	X	9
Southeast Asia	X	X	X	X	X		X	X	X	X		8
West Asia	X	X	X	X	X	X	X	X		X		8
South America	X	X		X	X		X	X	X		X	8
Central America	X	X	X	X	X	X	X	X	X	X	X	8
South Pacific	X	X	X	X	X		X	X			X	7
East Asia	X			X	X			X	X	X		6
Eastern Europe						X		X	X	X		4



Africa, the current population of 1.3 billion (and its projected population of 3.5 billion in 2100) underscores the importance of the African continent as a potential source of international migrants. Moreover, given the realities of global geography and the legacy of European colonialism, the migratory potential of Africa suggests a very high likelihood of future migration to Western Europe, most notably to Britain, France, and Belgium. Given Britain's widespread colonial occupation of South Asia, out-migration from that region is likely, not only to the United Kingdom but also to other English-speaking countries.

Next in descending order of potential for emigration are Southeast Asia, West Asia, South America, and the Caribbean, each logging eight risk factors, but with quite different populations of 660 million, 221 million, 431 million, and 180 million, respectively. Given the legacies of colonialism in the region, emigration from Southeast Asia is likely to be directed toward France, Portugal, the Netherlands, the United States, and Indonesia. West Asia, which contains countries of established emigration, such as Turkey, and several important sources of refugees and asylum seekers, including Iraq, Jordan, Lebanon, Palestine, Syria, and Yemen, would seem to forecast movement to Western Europe and North America given the region's former colonial ties and the history of US military intervention in the region.

Further down on the list, with seven risk factors, is the South Pacific, suggesting the potential for significant migration to Australia–New Zealand mitigated only by its small population (just 11 million in 2019 projected to reach 34.2 million in 2100). East Asia displays six risk factors, beginning with large population size but also low GDP per capita, a declining E/P ratio, elevated state fragility, low rule of law, and weak human rights. Here the wellbeing of China is paramount. As noted earlier, China has a long history of global diaspora and a recent history of rising economic penetration throughout the world. At this point, China does not send out migrants proportionate to its great size and its emigrants are found in diverse destinations throughout the world. In addition to population, the potential for Chinese emigration reflects the risks of having a strong but brittle government characterized by a limited rule of law and weak human rights.

Finally, we come to Eastern Europe, which is characterized by high inflation, high state fragility, limited rule of law, and weak human rights, which together encapsulate the risks of its post-Cold War autocratic governance. The lecture upon which this chapter is based was delivered in December of 2021. By the time of its writing in March of 2022, however, two Eastern European nations were at war following the Russian invasion of Ukraine with assistance from Belarus, displacing millions of refugees



into Western, Southern, and Northern Europe, underscoring the intrinsic potential for dictatorial powers to intervene in other nations in ways that displace people from otherwise peaceful lives. The spread of autocracy aggravates the risk of migration. When power is concentrated in the hands of one person with few checks and balances, failures of judgment can easily result in actions that produce sizeable waves of out-migration, as seen in the cases of Ukraine and Venezuela.

The remaining regions listed in the table would seem to have a low likelihood of large-scale emigration. The most vulnerable, according to the last column, is the Gulf Cooperation Council, which displays a declining E/P ratio and a low rule of law. As already noted, the former is under the control of GCC governments through their guestworker policies. Again, the greatest risk of emigration stems for the side effects of autocratic governance. Since 2015, Saudi Arabia has sponsored a military intervention in Yemen that, according to the latest data from the UN High Commissioner for Refugees, has produced 3.7 million refugees. The remaining regions listed in the table (Australia-New Zealand, Northern Europe, Southern Europe, Western Europe, and North America) constitute the most likely destinations for migrants.

Figure 2.5 turns from the hypothetical to the real to examine the actual volume of migration from countries in the regions under study, drawing on data from the UN Population Division (2022a) to capture net changes in the number of international migrants from 2015 to 2019. The light gray bars indicate the net outflow of international migrants from countries by region of origin. Consistent with the conclusions derived from Table 2.4, we see that Sub-Saharan Africa is the largest contributor to the global stock of international migrants. The number of migrants originating in a Sub-Saharan African nation but living in a different country at the time of enumeration grew by around 3.6 million persons, followed by South Asia at 3.3 million, West Asia at 3.2 million, South America at 2.6 million, and Southeast Asia at 2.1 million.

No single developed region contributes as many migrants to the global stock of immigrants as any one of these four developing regions. The net change in the number of international out-migrants originating in developed regions was greatest for Eastern Europe (1.8 million), followed by Southern Europe (1.5 million), East Asia (816,000), Western Europe (644,000), Northern Europe (464,000), North America (221,000), Australia–New Zealand (89,000), and the Gulf Cooperation Council (79,000). The net contributions of other developing regions to the stock of international migrants are also quite modest. After South Asia, the next

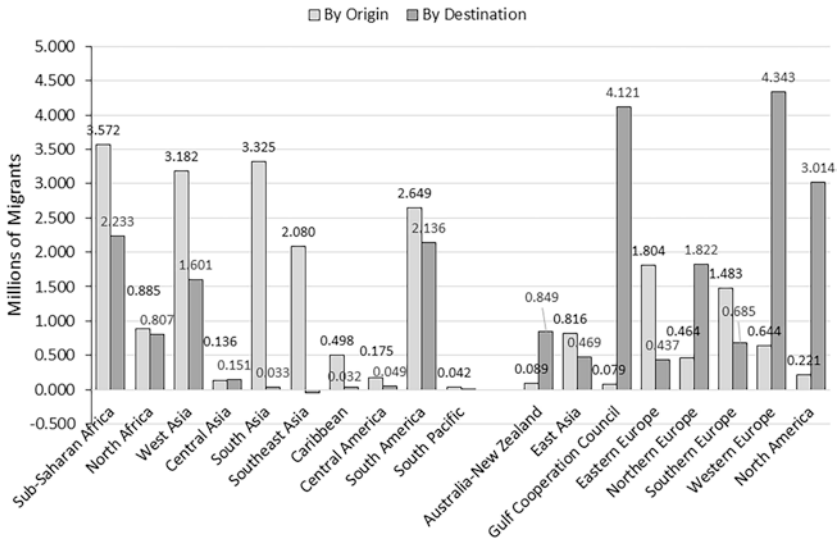


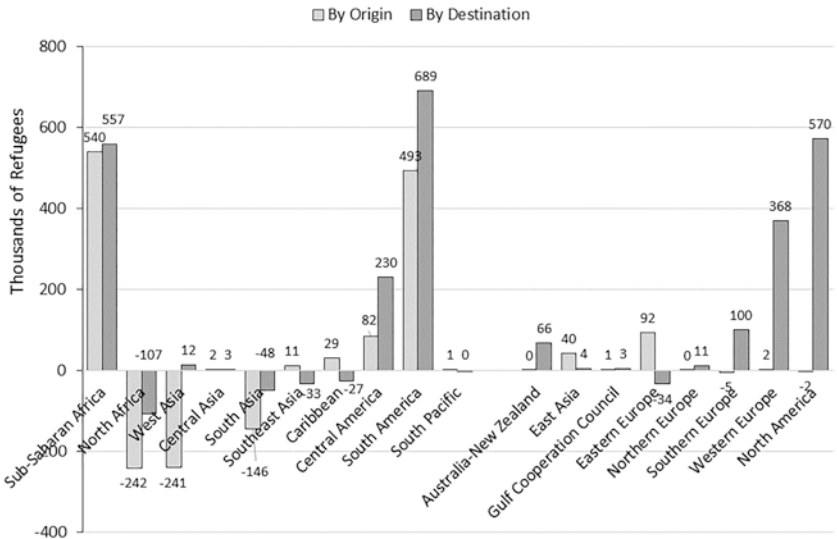
Fig. 2.5 Net change in number of international migrants by world region, 2015–2019. *Source:* UN Population Division (2022a), compiled by author

closest region is North Africa, with a gain of 885,000 migrants, followed by the Caribbean (498,000), South America (175,000), Central Asia (136,000), and the South Pacific (42,000).

The dark gray bars show changes in the net inflow of international migrants by region of destination. Unsurprisingly, the largest inflows are recorded by nations in Western Europe (4.3 million), the Gulf Cooperation Council (4.1 million), North America (3.0 million), and Northern Europe (1.8 million). Elsewhere in the developed world, the net inflow of migrants never exceeds one million, with flows of 849,000 in Australia–New Zealand, 685,000 in Southern Europe, 469,000 in East Asia, and 437,000 in Eastern Europe. The net inflow of international migrants greatly exceeds the outflow in four world regions—the Gulf Cooperation Council, Western Europe, North America, and Australia–New Zealand—indicating their status as the world’s leading regions of immigration. For East Asia, Eastern Europe, and Southern Europe, the outflow of migrants exceeds the inflow, indicating net losses of population through emigration in these poorer regions of the developed world.

Turning to the developing world, we observe substantial inflows of migrants into the nations of Sub-Saharan Africa (2.2 million), South America (2.1 million), and West Asia (1.6 million). Comparing inflows and outflows within a region reflects the degree to which departing international migrants simply go to other nations in the same region rather than moving further afield. Although 3.6 million Sub-Saharan Africans left their countries of birth between 2015 and 2019, around 2.2 million of went to other Sub-Saharan nations, meaning that some 63% of all the migratory moves were within-region. In South America, the figure was 81% and in West Asia the figure was 50%. In contrast, almost all the departures from countries in South Asia and Southeast Asia were to countries outside the region, principally to nations in the developed world.

Figure 2.6 draws on data from the UNHCR (2022a) to examine net changes in the number of persons of concern to that agency by region between 2015 and 2019. The light gray bars show net changes by region of origin to reveal a rather complex picture. Among developing nations, we see that three regions experienced sizeable net losses of refugees over the period and two show large net gains. Net losses occur when people,



**Fig. 2.6** Net change in number of persons of concern to UNHCR by world region, 2015–2019. *Source:* UNHCR (2022a), compiled by author

who before 2015 had been displaced from their places of original origin to internal or international locations within the region, had by 2015 either moved on to new locations outside the region or died.

North Africa, for example, experienced a net loss of refugees between 2015 and 2019, suggesting that some 242,000 people who had, before 2015, been displaced within North Africa had by 2019 moved on, mostly likely by heading across the Mediterranean with or without authorization and either reaching Europe or dying in the process. The net loss of 241,000 refugees from West Asia likely reflects Syrians or Iraqis who before 2015 had been displaced to locations in Turkey but by 2019 had moved on to Europe via land corridors through the Balkans or by boat to the Greek Islands. Similarly, the outflow of 146,000 refugees from South Asia could reflect the movement of displaced Afghanis across the border into Turkmenistan or Tajikistan, or even relocation to Europe.

In addition to the three regions with net losses of refugees, three had significant gains, including 540,000 persons in Sub-Saharan Africa, 493,000 in South America, and 82,000 in Central America. In each case, however, the net losses were offset by net gains in the same regions (see the dark gray bars), indicating that a large share of these refugee movements are within the same region. In South America, for example, the addition of 689,000 refugee arrivals at places of destination in the region is greater than the 493,000 departures from places of South American origin. This pattern reflects not just the large internal displacement of Colombians within Colombia in response to high levels of civil violence but also the arrival of millions of refugees from neighboring Venezuela, who were fleeing the collapse of its political economy.

Similarly, the relative balance of 540,000 refugee departures and 557,000 refugee arrivals in Sub-Saharan Africa indicates that most refugees in the region are either internally displaced persons or people sheltering in neighboring or nearby countries. In Central America, refugee departures from regions of origin number just 82,000 whereas arrivals by region of destination number 230,000, reflecting the large-scale displacement of Nicaraguans to neighboring Costa Rica as well as the displacement of refugees from El Salvador, Guatemala, and Honduras internally as well as into Mexico. Note that, in North Africa, the net change in the number of migrants by destination is negative, reflecting the use of North Africa as a staging area for Sub-Saharan migrants making their way to Europe. The net loss of 107,000 refugees in North Africa suggests that

many refugees from the south who arrived before 2015 had, by 2019, moved on toward uncertain fates at sea or in the European Union.

With two exceptions, there is no significant refugee migration out of regions in the developed world. Although a net outflow of 92,000 refugees departed Eastern Europe and 40,000 left East Asia, these numbers pale in comparison to the roughly half million net departures from Sub-Saharan Africa and South America. Instead, the prevailing pattern among regions in the developed world is the receipt of refugees from other world regions, led by North America with a net gain of 570,000, followed by 468,000 in Western Europe, 100,000 in Southern Europe, and 66,000 in Australia-New Zealand. Very few refugees arrive or depart from the Gulf Cooperation Council or Northern Europe.

In general, the information presented in Figs. 2.5 and 2.6 suggest a complex pattern of international population movements during the 2015–2019 period. Although we see clear evidence of the large-scale movement of both migrants and refugees from developing to developed regions, we also note that much of the movement from countries in the developing world remains within the same region of origin. Among refugees, we also observe the presence of stepwise migration, with the initial displacement of people from countries of origin in the developing world to countries of initial shelter in the same or adjacent regions, followed by subsequent movement to third countries of perhaps more permanent refuge.

## CONCLUSION

This chapter begins by describing three earlier periods of mass international migration that unfolded during the modern era: the forcible removal of some 12 million enslaved persons from Africa to the Americas during the mercantilist period of European colonialism from 1500 to 1888; the mass movement of 71 million persons out of Europe to the Americas and Oceania that accompanied industrialization from 1800 into the 1920s; and the mass international movements associated with the full globalization of markets in post-industrial period that began in the 1970s, leading to an unprecedented global population of 283 million international migrants by 2020, constituting 3.6% of the world's population. This brief survey, however, begs the question of what the future of international migration might be as the twenty-first century proceeds.

The question is assessed by undertaking a systematic review of data on the likely drivers of migration in four basic categories: demographics, economics, climate, and governance. The analysis of demographic indicators documents the existence young, rapidly growing populations with high youth dependency ratios in the developing world and older, slow-growing population with high elder dependency ratios in the developed world. Economic indicators reveal low per-capita GDPs, slow or negative growth in employment-to-population ratios, and high rates of inflation in the developing world compared with high GDPs per capita, rising employment to population ratios, and lower rates of inflation in the developed world.

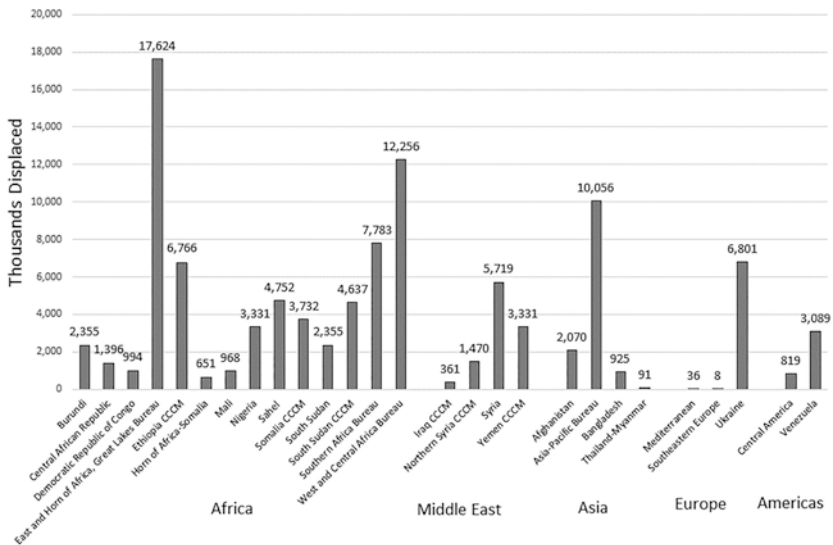
These obverse and complementary circumstances in developing and developed regions predict a continuation of the ordered pattern of international labor migration characteristic of the 1990s, when observers proclaimed a new world order of peace and prosperity under shared ideologies of liberal democratic governance and neoliberal economics, a view seemingly affirmed by the collapse of the Soviet Union, China's turn toward a market economy, the end of the Cold War, and, after 1990, the creation of a truly global market for goods, services, commodities, capital, and information governed by the Bretton Woods institutions.

Despite this optimism, a systematic assessment of different regions' vulnerability to, and readiness for, climate change reveals a huge gap in the relative adaptability of developed and developing regions. At the same time, a concomitant review of governance around the world reveals an assemblage of fragile state structures, weak rule of law, limited human rights, and high levels of violence across the developing world. Although these circumstances are hardly absent in the developed world, they are far less prevalent there. Where the complementary pairing of economic and demographic factors might presage a pattern of ordered international migration, the pairing of climate change threats and unstable governance in the developing world with climate adaptability and the rule of law in the developed world suggests a more disordered pattern of international movement as people increasingly move to escape threats at places of origin rather than access opportunities at places of destination.

Consistent with this more jaundiced view of the future of international migration, data reveal that, since 2000, the volume of movement by refugees, asylum seekers, and other displaced persons has increased more rapidly than the flow of international migrants. If this pattern of growing threat-based movement relative to opportunity-based migration continues, Sub-Saharan Africa, Western Asia, South Asia, and portions of Central and South America will figure prominently as likely sources of future

migration. Given current patterns of movement and historical legacies of trade and colonialism, we are likely to witness accelerating rates of forced as well as elective movement within well-established migration corridors that already connect Latin America and the Caribbean to North America; Africa and the Middle East to Europe; and Southeast Asia and the Pacific to Australia–New Zealand.

As of this writing, the Operational Data Portal of the UN High Commissioner for Refugees lists 24 “situations” around the world that the agency is actively monitoring (UNHCR, 2022b): 11 in Sub-Saharan Africa, four in the Middle East, four in Asia, three in Europe, and two in Latin America. Figure 2.7 shows the number of displaced persons associated with these situations to indicate the scale and geographic dispersion of forced migration in the world as of June 2022. In addition to the specific country cases, the list includes four Regional Bureaus (RBs) and six Camp Coordination and Camp Management Authorities (CCCCMs) run by UNHCR. Reading through the agency’s description of these cases, we encounter examples of displacements stemming from military invasion (Ukraine), civil warfare (Syria), genocide (the Rohingya in Bangladesh),



**Fig. 2.7** Number of displaced persons (000) in situations currently being monitored by the UN High Commissioner for Refugees. *Source:* UNHCR (2022b), compiled by author

interethnic conflict (Burundi), climate change (the Sahel), terrorism (the Boko Haram in Nigeria), criminal violence (Central America), state failure (Venezuela), famine (Ethiopia), and, in some cases, all of the above (West and Central Africa). The number of displacements range from 8000 (in Southern Europe) to 17.6 million (in the East and Horn of Africa and the African Great Lakes Region). Across all situations, this amounts to some 104 million persons in June 2022 (though the categories likely overlap).

The latest worldwide malady to sweep the globe is the Covid-19 pandemic. Between January 2020 and June 2022, it generated an estimated 528.3 million infections and 6.3 million fatalities (WHO, 2022). Available data do not yet permit an assessment of how the pandemic affected the cross-border movement of people globally. Time will tell what the long-term effects might be. However, preliminary indications are that it reduced the volume of international migration, at least initially, given that so many nations closed their borders in an effort to check contagion. As a result, despite the large and growing number of refugees in need of resettlement, UNHCR (2022b) reports that just 23,000 refugees were settled by the agency in 2021, the lowest number in decades. In the United States, the number of immigrant arrivals dropped by 31% between 2019 and 2020, while the number of refugee admissions fell by 61%; the latter number being the lowest total ever recorded since record-keeping began (US Office of Immigration Statistics, 2022).

In addition to posing political and policy challenges to political systems and leaders throughout the world, the rise of threat-based migration poses theoretical challenges to scholars attempting to understand and predict transnational movements in the future. Historically, refugee and migration studies pursues theoretically and substantively different fields of inquiry and scholarship, but the rising tide of threat-based alongside opportunity-driven migration underscores FitzGerald and Arrar's (2018: 387) admonition that "theorization in the sociology of migration and the field of refugee studies has been retarded by a path-dependent division that [...] should be broken down by greater mutual engagement." Likewise, the longstanding division between research on internal and international migration should also be abandoned given the reality that displacements induced by environmental degradation, extreme weather events, civil violence, and open warfare do not respect political boundaries (Bohra-Mishra & Massey, 2011a, 2011b).

Finally, given the role that government policies play in shaping how migration processes play out in practice (cf. Massey et al., 2016), the field needs greater engagement with political sociology (Waldinger & Soehl,



2013), specifically understanding the spread of autocracy (Swyngedouw, 2019), since autocratic rulers without checks and balances can make unwise unilateral decisions that unleash unexpected surges of migration. Although it took 50 years of migration between the imperfect democracy of Mexico and the more established democracy of the United States for 10% of all persons born in Mexico to end up in the United States, it took just five years for 10% of the population to exit Venezuela in response to decisions taken by the autocrats Hugo Chávez and Nicolás Maduro; and it took just one month for 10% of Ukraine’s population to relocate abroad in response to Vladimir Putin’s autocratic decision to invade.

## APPENDIX

**Table 2.5** Countries included in the analysis of regions in the developing and developed worlds

<i>Regions</i>	<i>Constituent Nations</i>
<b>Developing world</b>	
Sub-Saharan Africa	Angola, Benin, Botswana, Burkina Faso, Burundi, Cabo Verde, Cameroon, Central African Republic, Chad, Comoros, Côte d’Ivoire, Democratic Republic of Congo, Djibouti, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Republic of Congo, Republic of Tanzania, Rwanda, Sao Tome and Principe, Senegal, Sierra Leone, Somalia, South Africa, South Sudan, Togo, Uganda, Zambia, Zimbabwe
North Africa	Algeria, Egypt, Libya, Morocco, Sudan, Tunisia
West Asia	Armenia, Azerbaijan, Cyprus, Georgia, Iraq, Israel, Jordan, Lebanon, Palestine, Syria, Turkey, Yemen
Central Asia	Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan
South Asia	Afghanistan, Bangladesh, Bhutan, India, Iran, Maldives, Nepal, Pakistan, Sri Lanka
Southeast Asia	Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor-Leste, Viet Nam
Caribbean	Bahamas, Barbados, Cuba, Dominican Republic, Grenada, Haiti, Jamaica, Saint Lucia, Saint Vincent and Grenadines, Trinidad and Tobago
Central America	Belize, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama
South America	Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Suriname, Uruguay, Venezuela
South Pacific	Fiji, New Caledonia, Papua New Guinea, Solomon Islands, Samoa, Tonga, Vanuatu

**Table 2.6** Developed world regions and constituent nations

<i>Regions</i>	<i>Constituent Nations</i>
<b>Developed world</b>	
Australia–New Zealand	Australia, New Zealand
East Asia	China, Hong Kong, Macao, Japan, People’s Republic of Korea, Republic of Korea, Mongolia
Gulf Cooperation Council	Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates
Eastern Europe	Belarus, Bulgaria, Czechia, Hungary, Moldova, Poland, Romania, Russia, Slovakia, Ukraine
Northern Europe	Denmark, Estonia, Finland, Iceland, Ireland, Latvia, Lithuania, Norway, Sweden, United Kingdom
Southern Europe	Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Malta, Montenegro, North Macedonia, Portugal, Serbia, Slovenia, Spain
Western Europe	Austria, Belgium, France, Germany, Luxembourg, Netherlands, Switzerland
North America	Canada, United States

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# New Perspectives on Migrant Transnationalism in the Pandemic Era

Özge Bilgili , Maggi W. H. Leung  and Kia Malinen

## INTRODUCTION: MIGRANT TRANSNATIONALISM AND THE COVID-19 PANDEMIC

Thirty years ago, in 1993, *Nations Unbound: Transnational Projects, Postcolonial Predicaments and Deterritorialized Nation-States* was published by Linda Basch, Nina Glick Schiller and Cristina Szanton Blanc. This pioneering book established the changing nature and intensification

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of migrant transnationalism. Cited more than 3000 times in academic publications, Basch et al. (1993, p. 7) define migrant transnationalism as “the process by which immigrants forge and sustain multi-stranded social relations that link together their societies of origin and settlement”. Their reflections, along with many others, including Alejandro Portes (1999, 2001, 2003), Steven Vertovec (1999), Thomas Faist (2000a, 2000b) and Peggy Levitt (1999, 2001) challenged long-standing perspectives on international migration and integration processes of migrants in a globally connected way. Since the 1990s, due to advances in digital communication alongside fast and cheaper travel, interconnectedness between individuals and communities that transcends international borders has changed our way of thinking about international migration and related societal challenges.

Migrant transnationalism research is inherently linked with interdisciplinary research that encompasses sociological, (social) psychological, economic, political, historical and (human) geography perspectives. Migrant transnationalism research touches upon societal questions and challenges, ranging from social (in)equalities, social cohesion and diversity to economic and political developments. Throughout decades of research in the field, the questions of temporality and change are present both implicitly and explicitly (Griffiths et al., 2013). The time dimension within migrant transnationalism is not only about the life course perspective and changes over time in the individual lives of migrants themselves but encompasses larger overarching trends and changes as well as crisis situations and disruptions.

Within the debates on the role of time and change in migrant transnationalism research, the Covid-19 pandemic provides an extremely enriching perspective and fresh discussions on our understandings of transnationalism in international migration. Assuming a before–during–after perspective, in this chapter, our aim is to present, discuss and assess changes that may materialize in different dimensions of migrant transnationalism because of the pandemic. To do this, we go beyond looking at migrant flows in their own significance or financial remittances and take into account identity- and belonging-related issues as well. Our approach to migrant transnationalism takes into account not just peoples’ homes as well as the local and city-level but also spans across regions and nation-state borders, traversing different distances. This approach goes beyond the home–host country perspective, taking into account the relevance of ‘third-places’. We also pay attention to a multitude of actors involved in

transnationalism, going beyond migrants themselves to also include non-migrants and community organizations, diasporas and country governments at the national levels.

In line with the points made above, in this chapter our objective is to provide potential answers to, and reflections on, the following questions that both help us push forward research, conceptual discussions and theoretical discussions on migrant transnationalism, but also help to understand and be prepared for the post-pandemic era that will continue to be shaped and influenced by migrant transnationalism and international migration.

- How do crises disrupt, change and transform the economic and social transnational engagements of migrants?
- How do transnational identifications affect migrants' positionalities vis-à-vis the various societies they are embedded in? How do these, in turn, affect their actions, sentiments, sense of belonging, aspirations, plans and decisions?

In the remainder of this chapter, to answer the above questions, we first define further different dimensions of, and points of view on, transnationalism and international migration. We present and compare observations from the past, during and post-pandemic periods. In the first stage, we primarily focus on financial remittances as an essential aspect of transnational engagement. In the second stage, we move forward toward identity- and belonging-related issues, also incorporating discussions on prejudice, stigmatization and Covid-19-racism based on available empirical evidence. Consequently, we aim (1) to discuss how the Covid-19 pandemic is one among many global events that shape migration and integration trajectories; and (2) to show what the differential effects of global events on transnational engagements and belonging are.

### INTERNATIONAL MIGRATION AND MIGRANT TRANSNATIONALISM

Despite the increasingly complex and, at times, more restrictive channels for certain types of migration, migrant mobility reached unprecedented levels since the new millennium (Faist, 2006, 2013). While it is true that the registered international migration flows indicate that the share of the

total world population that is a migrant remains at the comparable level of 3% across decades—the 2020 figure is calculated at 3.6% (Massey, 2023, in this volume)—there are more and more invisible movements that are not registered and observed. The circularity of movement, (temporary) return migration flows, irregular mobilities as well as increased tourism present in today’s connected world should not be underestimated. Moreover, major bilateral movements between regions have diversified to the extent that, more than ever before, more individuals from many different parts of the world emigrate to more diverse destinations (de Haas et al., 2019). Within this context, the transnational lens accommodates the new realities of migrants’ lives and their interconnectedness across national borders through a wide range of economic, social, cultural and political relationships (Bilgili, 2014).

The transnational mobilities and engagements of migrants are reflected in decades of multidisciplinary research that touches upon different dimensions of ties between migrants and non-migrants across contexts (see Table 3.1). The transnational ways of being (Levitt, 2010), referring to

**Table 3.1** Types, categories and dimensions of transnationalism

<i>Types</i>	<i>Category</i>	<i>Dimensions</i>
<i>Transnational ways of being</i> Behavioural aspects including different forms of engagement and involvement	Social transnationalism	Virtual connections online Telephone conversations Social media usage Return mobilities
	Economic transnationalism	Sending/receiving financial remittances Sending/receiving goods Making investments in the home country
	Political transnationalism	Extraterritorial voting Engagement in diaspora organizations/hometown associations
<i>Transnational ways of belonging</i> Emotional aspect including feelings of identification and attachment	Transnational identification	Homeland attachment and feelings of belonging Identification with home country Feelings of nostalgia and wish to return

*Note:* adapted by authors from Al-Ali et al. (2001) and Levitt (2010)

migrants' involvement in activities oriented towards their homeland, encompass different arenas of life. One can generally distinguish between social, economic, civic/political and cultural practices. These connections are highly influential in the lives of migrants themselves, but also their communities and countries of origin. Take as an example, the migrant remittances, which are migrant earnings that are sent back home in the form of either cash or goods to support families and communities. Since the 1990s, these are growing rapidly, making them one of the largest sources of foreign income for many developing countries. Remittances to developing countries were USD 20 billion in 1998, reaching USD 334 billion in 2010 (Ratha, 2013). In 2021, officially recorded remittances to low- and middle-income countries were around USD 589 billion (World Bank, 2021). Thus, remittances remain more than threefold above official development assistance in many parts of the world.

'Transnational ways of belonging' refer more specifically to migrants' multiple modes of identification and corresponding feelings of attachment through history, memory or nostalgia (Levitt & Schiller, 2004). In the context of 2022, where identity politics, normative discussions on international migration and integration processes and social cohesion and multiculturalism, are primarily defined by cultural diversity, aspects of transnational ways of belonging should not be ignored. Ethnicity- and national identity-related discussions, as well as racism, Islamophobia, prejudices and structural discrimination that are observed in all areas of life in migrant-receiving country contexts (including in the form of labour market discrimination as outlined in Ahmed et al., 2023), make critical reflections on migrants' ideas of belonging, feelings of attachment and identification necessary.

Migrants' economic and social transnational engagements as well as societal tensions due to identity issues are particularly affected by the Covid-19 pandemic. On the one hand, financial remittances fluctuated, responding to the structural constraints posed by the pandemic. On the other hand, as Covid-19 spread, stigmatization, prejudice and discrimination made their mark in many parts of the world, focusing on ethnic minorities. These negative experiences raise questions about feelings of belonging, identity and positionality vis-à-vis the multiple contexts in which migrants are embedded. Therefore, in this chapter, we refer both to transnational ways of being and belonging in an attempt to discuss the effects of the Covid-19 pandemic.

## ECONOMIC TRANSNATIONALISM IN TIMES OF CRISES

*Financial Remittances during the Covid-19 Pandemic*

In the economic domain, we mainly refer to financial remittances, in-kind remittances, investments in the home country (e.g. house, business, land), purchase of government bonds, purchase of entry to government programmes, or charitable donations made either directly to the country of origin or in a community organization in the residence country (Al-Ali et al., 2001; Guarnizo et al., 2003). When the Covid-19 pandemic hit, there was much debate about the resilience of the remittance flows. Economists mostly predicted that remittances to low- and middle-income countries (LMICs) would decline. Ratha et al. (2020) predicted as steep as a 7% decline in remittances to LMICs in 2020 and for them to continue to decline in 2021 by another 7.5%. They predicted the amount of remittances to fall to USD 508 billion in 2020 and then to USD 470 billion in 2021. This prediction addressed the total amount of remittances to LMICs, with Europe and Central Asia being affected the most, with a predicted decline of 16% in 2020 and 7% in 2021 (Ratha et al., 2020).

What reasons were given to explain why the Covid-19 pandemic would hamper remittances? Experts expected a decline in remittance flows because of the increased health risks that migrants faced that, in turn, would affect their ability to work and send remittances (Ratha et al., 2020; Bahar, 2021). Additionally, due to global issues, like oil prices crashing and the high economic insecurity, migrants were perceived as an especially vulnerable group when it came to unemployment and the adverse effects it could have had on their personal economic situation (Abel & Gietel-Basten, 2020; Bisong et al., 2020; Ratha et al., 2020; Bahar, 2021). This was already found to be the case during earlier economic crises like the 2009 global financial crisis (Ratha, 2020). Moreover, some argue that, as a result of these economic and health insecurities, if they had had the chance, a large number of migrants could have potentially considered returning back to their origin country, which, in turn, would have decreased the flow of remittances (Bisong et al., 2020; Ratha et al., 2020; Bahar, 2021). Finally, given the unique context of the Covid-19 pandemic, lockdown environments could have potentially disrupted migrants' access to banks and money transferring services (Kpodar et al., 2021). Even though predictions for the flow of remittances were grim for these reasons, the situation at the end of 2020 was much better than expected.

After an initial plummeting of the overall number of remittances in April and May of 2020, when the pandemic first started, a gradual revival of the remittance flows was observed (World Bank, 2020, 2021; Kpodar et al., 2021; Bahar, 2021). At the end of 2020, remittance flows to LMICs were estimated to be USD 540 billion, leaving them only 1.6% below the level of 2019, which was USD 548 billion (Bahar, 2021; World Bank, 2021).

Even if the total remittance flows saw only a small decline, at closer inspection it could be seen that different regions fared in different ways. The following regions experienced a growth in remittances: Latin America and the Caribbean (6.5% up to USD 103 billion), South Asia (5.2% up to USD 147 billion) and MENA (2.3% to USD 56 billion) (World Bank, 2021). Other regions experienced a decline in remittances, including East Asia and the Pacific (-7.9% down to USD 136 billion), Europe and Central Asia (-9.7% down to USD 56 billion) and Sub-Saharan Africa (-12.5% down to USD 42 billion) (World Bank, 2021). These general patterns of decline, although not exactly correct in size, were in line with the predictions of Ratha et al. (2020) in the sense that the regions that were expected to experience the largest decline in 2020 also ended up being the only regions that experienced a decline. What should be noted is that the decline in Sub-Saharan Africa, however, is a bit misleading: the decline is mostly attributable to the decline in remittances to Nigeria, which accounts for approximately 40% of all the remittances to the region. Other countries in the region did not experience such stark declines; some even experienced an increase (World Bank, 2021).

It is also important to note that, to a certain extent, the decline in cash transfers was underestimated. Namely, some experts argue that since the Covid-19 pandemic restricted cross-border mobility, some remittances that would have usually been sent via informal routes were actually sent via formal routes (Ratha et al., 2020, p. 12; Kpodar et al., 2021; World Bank, 2021). This is in line with findings from earlier pandemics that restricted cross-border mobility, like the 2014 Ebola epidemic in West Africa (Bisong et al., 2020). In addition to this discussion, however, it also remains an open question as to what has happened to in-kind remittances that are expected to have dropped significantly in line with the restrictions on international travel.

After 2020, experts compared the impact of the Covid-19 pandemic on remittance flows to other health pandemics and economic crises. In general, it could be seen that the 1.6% decline in 2020 due to the Covid-19 pandemic was smaller than the 4.8% decrease in remittance flows in 2009



due to the global financial crisis (Ratha, 2020; Kpodar et al., 2021; World Bank, 2021). In regions like Europe and Central Asia, where the decline in remittances was at the higher end, the 2009 crisis resulted in a steeper decline of 11% compared to the 9.7% decline caused by Covid-19 (World Bank, 2021).

*Understanding the Resilience of Migrant Remittances:  
From Migrant Agency to Responsive Policies*

The less than feared negative effects of the Covid-19 pandemic on economic remittances poses the question of why and how migrants still managed to send money back home. Although there are many reasons why a global pandemic can hamper remittance sending, research also identifies many reasons why the global remittance flows were not as affected as initially expected. Here two major factors come to the fore: responsiveness of country governments to facilitate the continuation of financial remittances and migrants' agency in coping with crisis situations. The combination of these two factors created a strong buffer, allowing financial remittances to flow through the already existing corridors even at times of global crises.

For example, some countries, like Pakistan, adopted policies that incentivized remittance sending during the Covid-19 pandemic. The government decided that “withholding tax [will be] exempted from 1 July 2020, on cash withdrawals or on the issuance of banking instruments/transfers from a domestic bank account” (World Bank, 2020). Similar tax exemptions for remittances were also introduced in countries like Bangladesh and Sri Lanka (EMN, 2020; Takenaka et al., 2020). Other countries, like the United States, adopted national fiscal stimulus programmes to boost their own economy, which then also positively impacted the migrants' abilities to send remittances (Kpodar et al., 2021; World Bank, 2021). Surveying the evidence, IFAD and the World Bank (2021) notes that governments in various countries, like Ethiopia and Jordan, started offering incentives to increase digital transfers of remittances in an attempt to ensure that remittances that would usually be sent through informal channels would still be sent despite border closures. In Albania, a digital and financial literacy programme was started to increase the awareness and knowledge of both remittance senders and receivers of how remittances could be sent through digital channels. In other countries, like Mexico, Nigeria, Switzerland and the UK, among others, remittances were declared

to be an essential financial service and, as such, lockdown regulations no longer restricted the local operations of remittance providers.

Another set of reasons why remittances did not decrease as much as expected during the Covid-19 pandemic relates to the migrants themselves and their actions. Many authors discuss how migrants, during times of uncertainty in the country of origin, are motivated to support their families even more (Bisong et al., 2020; Bahar, 2021; Kpodar et al., 2021). Kpodar et al. (2021) find in their quantitative study that when the Covid-19 infection rates in the country of origin went up, the number of remittances increased directly thereafter. Bisong et al. (2020) also discuss how, during the 2014 Ebola epidemic in West Africa, the flows of remittances from migrants and diaspora members increased. These showcase how migrants aim to support their families more when the situation in their country of origin is uncertain. These responses were even stronger when the Covid-19 pandemic was combined with other local disasters. For instance, some findings show that an unrelated catastrophe in the country of origin, like the 2020 flooding in Bangladesh, caused increased remittance sending (World Bank, 2020).

Migrants' agency in coping with crises is also reflected in other strategies and reflected in other types of migrant behaviour. For example, Bahar (2021) discusses how migrants are able to afford to send more money during times of economic uncertainty and even unemployment. The main reason for this is that they tap into their savings. In a similar vein, Bisong et al. (2020) observe a comparable trend during previous crises amongst migrants from Sub-Saharan Africa. However, these behaviours should be considered with caution as the savings of migrants can be limited, and the sustainability of such strategies/actions is open to question. Additionally, the migrant resilience and adaptability is brought up by Bahar (2021), who argues that, where possible, many migrants also switched industries to work in essential services in order to be able to continue to support their families back home. Once again, Bisong et al. (2020) suggest a similar trend of switching industries during the 2009 financial crisis among Sub-Saharan migrants. Despite these preliminary suggestions, which are important for understanding the ways in which migrants cope with economic crises, further cross-national investigation is needed to clarify under what conditions, and for whom, these strategies are plausible and viable in the long term.

*Fluctuations in Economic Remittances Impact the Poorest the Most*

Despite the more positive outcomes at the end of 2020 with regards to financial remittances, there were still groups that were especially negatively affected by fluctuations in remittance flows. In general, impoverished households in lower income countries, who rely heavily on remittances as a part of their household income, are found to be the most affected (Bisong et al., 2020; Gupta et al., 2020; Caruso et al., 2021; Murakami et al., 2021). These trends are found in Latin America: Caruso et al. (2021) find that the most affected household are low-income households and that the more they rely on remittances throughout the year or at a specific period in the year, the more vulnerable they are to increased poverty due to remittance fluctuations. Gupta et al. (2020) find in rural India that impoverished households experienced a heavy drop in household expenditures in the first month of the pandemic when remittance flows decreased. This resulted in the families decreasing their non-consumption item buying to almost zero and largely cutting down on their food consumption and diversity of food consumption.

Families who were drastically affected by the fluctuations in remittance inflows were not completely deprived from solutions. Murakami et al. (2021) find that, in the Philippines, families made up for losses in remittances through non-agricultural income and other domestic income. Gupta et al. (2020) also highlight that, at the start of the first Covid-19 lockdown, families with the greatest financial challenges received some food aid from the Indian government. Gupta and colleagues also find that families in rural India coped with the reduced remittance flows through increased in-kind borrowing. Yet it cannot be forgotten that such strategies may also put families in more vulnerable situations and risk increasing their long-term debts. These findings from different regions of the world demonstrate that already impoverished households that are highly reliant on remittances may continue to suffer even if the overall trend in remittance flows was not as negative as initially expected. Therefore, it is vital to go beyond the general trends and identify which segments of the population are most likely to be affected by the fluctuations in remittances both in the short and long term. According to Murakami et al. (2021), a first step to start identifying especially vulnerable groups can be done by examining the geographical distribution and composition of a country's immigrant diaspora. Understanding from which areas in the country immigrants are from, where they have migrated to and what types of employment they

have can be an important indicator of how remittance flows might be impacted and who within the population may be affected the most. Murakami and colleagues argue that, at the national level, a more heterogeneous emigrant population in terms of country of destination and employment in different sectors and industries can fare better, thus being more resilient to shocks and sustain remittances flows to the origin countries.

### *Transnational Entrepreneurs, their Challenges and Coping Mechanisms*

In this subsection, we give attention to transnational entrepreneurs, a group of immigrants who were expected to be uniquely affected by the Covid-19 pandemic and yet had their own strategies to manage the impacts of the pandemic. Transnational entrepreneurs are immigrants who own their own businesses, which operate in transnational contexts and between different institutional settings (Harima, 2022). Although this group was severely affected by the Covid-19 pandemic, due to their special nature, they also possessed abilities to uniquely adapt to the new situation. Through his 23 in-depth interviews with transnational migrant entrepreneurs residing predominantly in Germany, with some residing in other European countries, South-East Asia, South America and North America, Harima (2022) examines how transnational entrepreneurs were impacted by the pandemic. He finds that the pandemic created challenges for the entrepreneurs. First, they were especially vulnerable to the pandemic because of the deglobalization reflected in border closures and limitations to individual mobility. Cross-border activities and travelling were considered to play a central role in the participants' business activities and not being able to travel affected how they created value with their businesses. Second, because they operate between multiple institutional contexts and markets, they had to deal with unexpected changes in both origin and residence country contexts, navigating the impact that these changes had on their business activities. Third, the sectors that transnational entrepreneurs tend to be embedded in—tourism, international trade and manufacturing—were all heavily affected by the pandemic and the ensuing lockdowns.

Despite finding that transnational entrepreneurs were heavily impacted by the pandemic, Harima (2022) also finds that they were able to cope and adapt to the situation in creative ways. First, transnational

entrepreneurs utilized their embeddedness in multiple countries and utilized the best parts of each institutional setting they were working in to navigate having a business during the Covid-19 pandemic. For example, some participants explained that they were able to shift the production of their product from their country of origin to the country of residence when the borders closed. This way they could continue developing their business despite the border closures. Second, they adapted their business models and started creating value by meeting new demands that rose from the pandemic. For example, one entrepreneur was able to adapt their food box business by adding a cultural component to it, thus fulfilling the need for having cultural experiences during lockdowns when travel was not possible. Additionally, they started digitalizing their existing services and products. For instance, an entrepreneur organizing internships in Germany for employees of Japanese firms introduced a new virtual internship experience after the pandemic started. Lastly, the participants, who had previously heavily relied on travel in order to communicate with their teams and customers in person, now started relying more heavily on digital forms of communication, for instance video conferences. Once entrepreneurs started using more digital forms of communication, they were actually able to start utilizing an even wider transnational network and activate social capital within those networks to not only keep their businesses running but also to collect money or resources to send to their countries of origin.

### SOCIAL TRANSNATIONALISM DURING THE PANDEMIC ERA

Within the sociocultural domain, as important channels, we often refer to social relationships maintained through visits to friends and family in the origin country, or contact through telephone, letters, e-mails, links with homeland or diaspora organizations, and attendance at social gatherings with the ethnic community in the host country. In addition, individuals' participation in cultural events (e.g. concerts, theatre and exhibitions) about their country of origin or their consumption of media, art and other cultural products can be included as part of practices in the sociocultural domain. All these activities are observable actions, meaning that they are quantifiable and measurable in a systematic way. The Covid-19 pandemic generated a context in which these social contacts with families and friends in the home countries became even more important in the lives of migrants and their families. Particularly in a context where return visits became

almost impossible in most parts of the world, social contacts maintained through internet, phone calls and social media occupied a significant part of social lives.

It is well established that it is not only ‘money’ that is circulated by migrants, but a significant aspect of their social and cultural connections with their home countries also entails the circulation of ideas, practices, skills and social capital. More than 20 years ago, Peggy Levitt (1999) introduced the idea of social remittances, drawing attention to the relevance of sociocultural transnationalism. Through sociocultural transnationalism, over time both migrants themselves and their societies of origin are influenced (Khagram & Levitt, 2008; Faist, 2013). When it was introduced at the turn of the century, it was argued that social remittances may alter people’s behaviour and transform notions about gender relations, democracy and so forth (Levitt, 1999; Levitt & Lamba-Nieves, 2011). In similar ways to how economic remittances responded to the pandemic as a global crisis, one can expect that the bilateral flow of social remittances used in the broader sense may have also been affected by the pandemic, both in terms of their content (e.g. stronger shift towards health related topics) and the channels through which they were shared.

As we propose in this chapter, crisis situations create new opportunities to observe and reflect on how transnational engagements respond to, and are shaped by, critical events. In fact, some researchers coined the term ‘pandemic transnationalism’ to refer to the “circulation of ideas and practices in times of pandemic which encompasses an exchange of informal practices that affects not only the lives of migrants and their families in their home country, but their close circle of friends and neighbours as well” (Galstyan & Galstyan, 2021, p. 2). During the pandemic, many migrants who were in communication with their social contacts in other places found themselves in new types of conversations. These (transnational) social networks provided migrants with diverse and, at times, contradictory information and advice (e.g. usage of masks; cf. Rogstad, 2023, this volume). This access to multiple sources of information may have created its own challenges and tensions, since migrants were exposed to the differences in opinions, views, caring practices and ways of dealing with the pandemic. This is also partially due to the differences between countries, as some developed their own strategies and preventative measures in the face of the pandemic.

Moreover, at times, the protective systems migrants found themselves in were significantly different from those of their families, friends and acquaintances. These differences triggered conversations around sharing

experiences and views on the pandemic. Within the context of the pandemic, new issues, especially in relation to health care and hygiene, were at the forefront of discussions. For example, the work of Galstyan and Galstyan (2021), which focuses on the case of Armenian transnational families located in Russia, the Czech Republic and Belarus, highlights that these topics were central in discussions and negotiations between families in terms of what is acceptable social behaviour. In short, migrants had to negotiate varied cultural perspectives (of origin countries, where they live and other places to which they are connected) while interpreting decisions and recommendations provided by their local government. In this regard, the pandemic brought to the fore some of the pre-existing tensions that migrants face on a daily basis when negotiating their norms and values as well as when making choices on how to behave and relate to the expectations in their country of residence, but this time through topics related to health, hygiene and contagious diseases.

Finally, we find it relevant to reflect on the interactions between social (pandemic) and economic transnationalism, pointing out the symbolic and emotive meaning of remittances and goods for both senders and receivers (Mazzucato, 2011; Le Dé et al., 2016). The emotional relevance of in-kind remittances and their power to enhance reciprocal relationships became strongly evident within the pandemic time. In various contexts, migrants sent protective equipment, such as masks, gloves and sanitizers, to their families and friends (Leung & Hao, 2021). In line with the concept of reverse remittances (Mazzucato, 2011), this is not just from migrants to their families but also the other way around. In areas and regions where access to masks was rather difficult at the beginning of the pandemic, migrants also received these products from their social networks. In fact, at times these material transfers were also facilitated, if not initiated, by country governments. For example, in the Netherlands, when access to masks was very limited, the Chinese government sent so-called health bags to their diaspora. In particular, international Chinese students received these packages as a symbolic reflection of delivering support. When these types of transfer of goods take place on a personal level, they also indicate a certain level of responsibility, connection and affinity to other members of the families who are going through this global crisis 'together' (Leung & Hao, 2021).

## TRANSNATIONAL BELONGING AND INCLUSIVITY

*The Consequences of Discrimination and Stigmatization*

In this chapter, we also pay particular attention to how transnational belonging of migrants is affected given the discrimination and stigmatization induced by the Covid-19 pandemic. We are interested in understanding how migrants identify themselves; how they are identified by others during the Covid-19 pandemic; and how these, in turn, affect migrants' actions, sentiments, sense of belonging, aspirations, plans and decisions (where to be, what to do, with/for whom etc.). Throughout history, outbreaks of infectious diseases are key contexts within which discriminatory behaviours emerged in various ways. After its first outbreak, in the Chinese city of Wuhan, at the end of 2019, Covid-19 spread across the globe. Consequently, stigmatization, prejudice and discrimination followed in its trail. Immediately, reports on physical or verbal assault on people of Chinese/East and South-East Asian appearance were abundant, even in many 'multicultural societies' in Europe (cf. Osanami Törngren et al., 2023, in this volume). Racially motivated attacks in both physical and digital spaces were reported. In the Netherlands, Lex Gaarhuis and his song *Voorkomen is beter dan Chinezen* ("to prevent is better than Chinese", a word play with the saying "to prevent is better than to heal"), while causing major national uproar, is just one example of how racism once again revealed itself in the heart of Europe. Many speak of the 'Corona-racism pandemic', denoting the rise of racialized acts and narratives since the advent of Covid-19.

Li et al. (2021) observe the reaction of people of Asian—particularly Chinese—background in multiple contexts in relation to discrimination against their co-nationals. Their interdisciplinary work, which brought together media and cultural psychology, illustrates that the exposure to media intensified collective anger. Even when communities are transnationally located, they share and identify with negative emotions collectively. In the face of xenophobic threats, especially when the migrant communities already felt cultural distance from the host society, these emotions were stronger. Put differently, the negative atmosphere during the Covid-19 pandemic was a tipping point for those who were already feeling social exclusion and distance, thus exacerbating the existing, and yet rather invisible, feelings of frustration and dissatisfaction. In a similar vein, the work of Wang et al. (2021) on Chinese students in France



illustrates the intensified experiences of racism. In many instances, researchers observe that these negative experiences were also coupled with lack of identification and changes of future plans to settle long term. Wang et al. (2021, p. 737), for example, argue that “contrary to the republican universalism promised, the descendants of Chinese migrants encounter difficulties concerning their full access and unsuspected belonging to the French Nation because of their physical appearance”.

People who are confronted with acts of racism are not only victims. Their own experiences, in combination with increasing media coverage of the topic, increased their awareness of the issue and also led to them taking action against it. Street protests and demonstrations took place in major cities across North American and Europe. In our own research in the Netherlands, engaged Chinese and Asians organized and took part in two demonstrations, claiming citizenship in a way, on Museumplein, a square located close to the centre of Amsterdam. At these events, hundreds of people, including non-Chinese and non-Asians, protested against anti-Asian racism that had been ignored in public discourse (Leung et al., [forthcoming](#)). Beyond taking a stand in physical urban spaces, affected Chinese people were also active in resistance in digital spaces. In fact, as an elementary part of our contemporary society, (social) media, chat forums, blogs, YouTube and other digital channels are now vibrant spaces where racialization and other social conflicts are being played out and resisted. Migrants do not only intensify their connections among each other because of racism, the lockdowns and restrictions in social contacts also prevented them, especially newcomers, from embedding in their new environment. Facing isolation, many migrants turned to their local co-ethnic and transnational diaspora networks for support. Our study of Chinese students reveals the strong sense of Chineseness, collective identity and solidarity among many (Leung & Hao, 2021).

### *The Role of Residence and Origin Country States*

In this final section, we underline the role of the residence and origin country states in shaping migrants’ experiences. Social policy strategies and efforts implemented by local governments and other relevant organizations in reaching out to migrant groups differed significantly across places where migrants reside. Efforts to reach out to migrants and to create systems that support migrants during the Covid-19 pandemic took different forms. For example, in Germany, the government started a

digital campaign, translated into multiple languages, in order to specifically reach out to migrants and provide them with information about Covid-19 (OECD, 2020). Other countries, like Ireland, automatically extended migrants' work permits during the pandemic and made it possible for anyone who lost their job due to Covid-19 to qualify for unemployment benefits (OECD, 2020). These strategies can be influential in making migrants feel like they also belong. Without them, migrants and refugees may feel socially excluded, lack trust in society and will not comply with local Covid-19 regulations. There are several studies looking into the role of trust in government and authorities (Briscese et al., 2020; Nivette et al., 2021), both in Switzerland and Italy, showing the relevance of these factors in (non-)compliance with Covid-19 rules. However, more research is needed in order to understand to what extent these factors are relevant for migrant populations, not only in shaping their compliant behaviours but also daily life experiences.

There is already some evidence regarding the important role of the local and national authorities' policy approaches in shaping migrant experiences. For example, in the Dutch context, van den Muijsenbergh et al. (2022) show that, in particular, undocumented migrant workers felt very vulnerable and excluded from Covid-19 measures due to structural barriers. They find, in a small qualitative study, that their participants wanted to comply with Covid-19 regulations, actively sought information about Covid-19 and wanted to take part in testing. However, structural barriers in the Netherlands prevented them from complying properly with preventive measures. At the beginning of the pandemic, they had very limited access to tests and even when there was a possibility to test without a *burgerservicenummer* (BSN—Citizen Service Number), they lacked information about testing facilities due to language barriers. Additionally, they faced major challenges with employment, access to food and housing insecurity because they were excluded from formal support systems organized by the state. In other words, the ways in which the Covid-19 pandemic was handled by officials had important consequences for how migrants and refugees responded to the measures. Negative experiences may, in turn, aggravate social isolation and foster reflections on (transnational) belonging.

As migrants are embedded in transnational spaces, they are also connected to, and affected by, their homeland state. In our research, we document the role of the transnational Chinese state in the pandemic. It evolved from a needy motherland seeking support from its diaspora when

the pandemic began in Wuhan to a benevolent state offering care to its daughters and sons abroad as well as to the wider world within a matter of a few months. These ‘care circuits’, taking the forms of repatriation, donations, supplies of care packages and dissemination of public health information, deepen the emotional and material bonds between many Chinese overseas and the Chinese state. Many research participants expressed to us their strong sense of Chinese identity as a result of the pandemic (Leung & Hao, 2021). Similar caring acts were also carried out by other states with large diaspora, like the Philippines and Turkey. In future research, it is of great significance to further understand the interactions between these experiences, transnational belonging and other related outcomes for migrants and societies at large in times of crises.

In conclusion, with its multi-faceted effects on migrant lives, the Covid-19 pandemic provided new perspectives and reflections on transnational engagements and belonging. Overall, it would not be wrong to say that the pandemic put migrants in more vulnerable situations compared to the rest of the population in various ways (e.g. employment opportunities). In this regard, the pandemic significantly affected the everyday lives of migrants. However, the points made in this chapter highlight that it was not only their daily lives, but also the social and economic connections with their families and friends in different contexts, that were affected. The maintenance and, at times, even the intensification of transnational relationships illustrate that, in times of crises, migrants and their social networks need and rely on each other for their individual and collective resilience (Walsh, 2020). In this regard, we find it important to reflect on migrant transnationalism not only through a vulnerability lens, but also considering the conditions under which migrants remain resilient, utilizing and activating their diverse (transnational) resources. By presenting both origin and destination country policies during the pandemic, we also illustrate the essential role they play in shaping migrant (transnational) experiences.

Moreover, the studies we discuss highlight how the Covid-19 pandemic raised questions of belonging and identification via the detrimental roles of discrimination and racism. Our own intersectional research conducted in the Netherlands also proves that viral outbreaks still have an overwhelming effect on society at large and that racism, in its many appearances, might be less visible as it was in the centuries before, but is, unfortunately, still a very powerful force in all of our social and political realities. In this regard, indeed, the Covid-19 pandemic is a tipping point, bringing to the

fore some of the existing challenges that migrants have. Yet, it remains to be seen if the effects of the pandemic on migrant transnationalism will remain in the long term. We think that this is a question that needs to be answered by studies across different migrant groups and contexts, taking into account the many different dimensions of migrant transnationalism.

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# Cosmopolitanism and Welfare Chauvinism in Sweden

Max Jerneck 

## INTRODUCTION

In an infamous political campaign ad, a lone Swedish pensioner is seen racing against a horde of burka-clad women, many of them pushing baby carriages. They all hurry to reach a money spigot labeled “the state budget.” Two emergency brakes hang from the ceiling. “Now you can choose,” says the speaking speaker voice, “a pension brake or an immigration brake.” The ad was made for the 2010 Swedish election by the right-wing populist Sweden Democrat party (Sverigedemokraterna, SD). It sparked outrage and was banned, even before it aired, for breaching the law against religious persecution. Pensionärernas riksorganisation (PRO—National Federation of Pensioners) denounced it for pitting the two groups of people against each other (Skarin & Lindh, 2010). The welfare state depends on immigrant labor, they said, so the ad presented a false choice.

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At the time, Sverigedemokraterna was an isolated fringe party. No other party would touch them or their brand of anti-immigrant messaging. A cosmopolitan consensus dominated politics, the media, and, to a lesser extent, the Swedish electorate. But while the explicit Islamophobia of the Sweden Democrats was anathema, the underlying frame of a conflict between immigration and the welfare state could be found in mainstream discourse, among the leaders of both political blocs.

In 2014, conservative Prime Minister Fredrik Reinfeldt gave a famous—often considered infamous—speech about the need for Swedes to “open their hearts” to refugees. Accepting people who fled war in the Middle East was the country’s moral duty, he said. It would be costly, of course. Opening hearts also meant opening wallets. Less spending would be available for social reforms. The so-called reform space in the budget would be taken up mostly by aid to refugees, but it was worth it.

This noble sentiment was not shared by everyone. In the shadow of the cosmopolitan consensus, a growing share of voters had begun moving toward the anti-immigration Sweden Democrats. Founded by neo-Nazis in 1988, the party had long been outside the bounds of polite society. But it worked to clean up its act, replacing steel-plated boots with three-piece suits. Since anti-immigration sentiment was off-limits for other parties, a sizable part of the electorate was up for grabs. The Sweden Democrats entered parliament for the first time in 2010 with 6 percent of the vote. In 2014, their share grew to 13 percent. As a result, Reinfeldt’s liberal-conservative Moderaterna (M—Moderate Party) and his coalition failed to secure a majority. Negotiating with the Sweden Democrats was out of the question, so Reinfeldt chose instead to resign and hand power over to Socialdemokraterna (S—Social Democrats). The cosmopolitan consensus lived on, for a while. Sweden continued to accept the most refugees per capita in Europe. “We do not build walls,” said Social Democratic Prime Minister Stefan Löfven in September 2015, during the wave of Syrian refugees. A few months later, things changed.

The 2015 refugee wave overwhelmed the existing Swedish immigration infrastructure, in part because of a failure to anticipate the severity of the Syrian civil war. Toward the end of the year, restrictions were imposed. Rather than a temporary break, this turned out to be a regime shift (see, e.g., Bucken-Knapp & Zelano, 2023, this volume). The previous open stance soon came to be seen as hopelessly naïve: the country’s capacity to absorb immigrants had clearly been exceeded. “We will never go back to 2015” became a new Social Democratic mantra (Olsson, 2021a). Social

Democratic politicians began to emphasize how much they had restricted immigration. The Moderate Party, now inching toward an alliance with the Sweden Democrats, went further. Welfare chauvinism—the idea that the welfare state should be restricted for immigrants—had previously been associated with the explicit ethno-nationalism of the Sweden Democrats, but now became part of the Moderates’ new strategy. In 2021, its new party leader, Ulf Kristersson, and his economic spokesperson, Elisabeth Svantesson, suggested that since the Swedish welfare model depends on everyone “paying in,” it is only natural that immigrants should receive a lower level of benefits during their first years in the country (Kristersson & Svantesson, 2021). In the spring of 2022, the Social Democratic government submitted a motion to parliament to restrict the pensions of people born abroad (Riksdagen, 2022).

How did the cosmopolitan consensus collapse so quickly? One reason may be that it was not very strong to begin with. It was wide but not deep and was not supported by a solid intellectual foundation. This in turn inhibited policies that would have made immigration more sustainable. Despite the welcoming attitude, the dominant discourse framed immigration as a burden. It was a burden Sweden could, and should, bear, but a burden nonetheless. But if immigration is always framed as a burden, it is not surprising that public opinion would turn when immigration increased. The fundamental discourse about immigration never really changed; what changed was the number of immigrants arriving. The cosmopolitan consensus relied on fair-weather reasoning. It depended on solidarity rather than coherent economic arguments.

This chapter examines how the cosmopolitan consensus was undermined by an underlying scarcity mindset, centered on resource constraints. More specifically, the binding constraint is conceptualized as a finite amount of tax money. Additional spending on immigrants means either higher taxes or less spending on everything else. This frame does not just dominate the public debate but public policy as well. It is enshrined in a budget law that puts limits on deficit spending. Constant tight fiscal policy keeps the unemployment rate in Sweden at around 7 percent; for immigrants, it stays around 15 percent. Investments in housing and public services that would have been needed for successful integration have been neglected. Immigration is accompanied by social problems and crime, fueling resentment among voters.

An alternative frame could suggest that it is always appropriate to spend more money when the population grows, whether from immigration or

native births. This latter frame has largely been absent from the public debate, even among proponents of immigration, making any serious commitment to cosmopolitanism a major challenge. Cosmopolitanism and scarcity sit uncomfortably together. When put under pressure, one of them will have to give. In line with Peo Hansen (2021), this chapter suggests functional finance as an alternative frame that would be more amenable to cosmopolitanism.

## TWO FRAMES: SCARCITY VERSUS ABUNDANCE

Political views are shaped by tacit notions of how the world works. One dividing line runs between whether resources are perceived as fixed or elastic. If the world is viewed as a zero-sum game, immigration can only occur at the expense of natives. Right-wing populism is built around the idea of in-groups and out-groups. Support is garnered when the in-group is made to feel threatened by the out-group. A zero-sum conception of the world is integral to that project. Historically, the concept of scarcity has been fundamental to ethno-chauvinist ideology. Fascism was constructed on the idea that the world was being closed off to late developing countries, whose only hope was aggressive expansion (Mann, 2004). The idea of a fixed level of food production was translated into a perceived need to secure living space abroad.

Regarding real resources, both frames can be said to have a legitimate claim to truth, depending on the context. The scarcity frame is more plausible in the short run, while the abundance frame becomes more plausible in the longer run. At any given point in time, there are only so many real resources for people to share. In a longer perspective, new resources can be created. Infrastructure can be built, people can be trained, and immigrants can join the workforce. Moreover, resources are often idle or used in inefficient ways. And the technological frontier can be moved infinitely. Capitalist economies are “surplus economies,” where the ability to produce resources outruns to the capacity to consume them (Kornai, 2013).

While there is truth to both frames, one common version of the scarcity frame is harder to support. In the dominant public discourse in Sweden, a leap is made from the notion of scarce real resources to a scarcity of money. While true at the individual level, it does not apply to a nation-state with its own currency and central bank. An underlying premise of the Swedish discourse around immigration as a burden is that tax money is scarce. The welfare state is thought to depend on a steady stream of revenue and if

expenses go up, the welfare state will either have to be cut or taxes increased. The logic of taxpayer money holds that anyone who receives more in benefits than they pay in taxes is a net drain on the state's ability to finance the welfare state. With this logic, the more a person earns, the more they pay in taxes, and the more they contribute to the welfare state. Immigrants, who often find themselves at the bottom of the labor market or outside it altogether, are conceptualized as parasitic. The view that immigration results in reduced expenditures for other ends or increased taxes is framed not as a political choice but as an inescapable fact about how the world works. It is built into the dominant policy paradigm.

### POLICY PARADIGMS

The term policy paradigm was coined by Peter Hall (1993) to explain the sudden shift from Keynesianism to monetarism in Britain. It is borrowed from Thomas Kuhn's (1962) term for the unseen structures of taken-for-granted assumptions that shape scientific thought. Paradigms enable cumulative learning, but anomalies emerge along the way. At first, they can be explained away or made to fit within the paradigm through ad hoc solutions. But eventually their weight may grow so large that the paradigm collapses, making previous knowledge obsolete. Frank Dobbin (1993, 1994, 2002) builds on Peter Hall's adoption of the term into social science, using it to explain national differences in industrial policy. Closely related ideas can be found in Rein and Schön's (1991) notion of policy frames. Intellectual roots can be found in the tradition of social constructivism and the study of how subjective understandings of the world shape thoughts, actions, and institutions. Policy paradigms encapsulate the power of the Thomas theorem: "If men define situations as real, they are real in their consequences" (Merton, 1948).

Policy paradigms are socially constructed conceptions of rationality, reflecting shared understandings of how the world works (Dobbin, 1994). They are institutionalized meaning systems, embodying deep-seated conceptions of relations between cause and effect. Policy paradigms pertain to the tacit dimension of policymaking; as cultural constructions, they are difficult for members of the same culture to critically evaluate or even observe. Their power derives from being considered so obvious that they rarely have to be fully articulated. They are "influential precisely because so much of it is taken for granted and unamenable to scrutiny as a whole" (Hall, 1993, p. 279).

Policy paradigms operate through language and are “embedded in the very terminology through which policymakers communicate about their work” (Hall, 1993, p. 279). Their power derives from the ability to facilitate storytelling. They underpin narratives and discourses that organize thought, perceptions, and actions (Rein & Schön, 1991). Central components are “generative metaphors,” that are carried over from one domain to another, changing how social phenomena are perceived (Schön, 1979). Through metaphors, complex societal matters can be understood as variations of everyday experience, providing a common sense understanding of the issue. Policy frames are “predicated on the notion that the social world can be understood as a series of mundane cause-effect relationships that can be gleaned directly from experience” (Dobbin, 2002, p. 186). Such simplification serves the useful purpose of pointing out paths of action through an otherwise confusing jumble of empirical facts and events.

As in Kuhn’s theory of science, there is often no way for bearers of different policy paradigms to agree. Disagreements within a common frame can be resolved by recourse to facts, but when frames collide they give rise to insoluble *controversies*, “which cannot be settled by recourse to facts alone, or indeed by recourse to evidence of any kind; because they derive from conflicting frames, the same body of evidence can be used to support quite different policy positions” (Rein & Schön, 1991, p. 265). Much like scientific paradigms, policy paradigms persist until the number of unexplainable anomalies grows so large that the paradigm breaks down and a new one takes its place. Conversions from one paradigm to another do occasionally occur, but progress mainly advances, as Max Planck put it, one funeral at a time. The switching of paradigms takes place with the logic of social movements (Fligstein, 1990). Needless to say, paradigms generally change when their policy prescriptions align with the interests of powerful actors. Once in place, however, their power persists through institutionalization and their status as unexamined truths. As such they are difficult to displace. Attacking a paradigm head-on is rarely the most tactical way to make an audience receptive to your claims. When seeking support for a policy, it is common to present arguments that hitch on to dominant frames and their conventional metaphors, in turn strengthening them (Rein & Schön, 1991, p. 268). That is how policy paradigms can persist for centuries.

The Swedish paradigm for framing the costs of immigration can be defined as the sound finance paradigm. It will be explained below,

followed by a description of an alternative, and currently marginal, paradigm that might fit better with cosmopolitan ideals: the functional finance frame.

### THE SOUND FINANCE PARADIGM

The sound finance paradigm is built around the generative metaphor of the household budget, applied to the budget of the state. Money is depicted as a scarce physical *thing*, just like gold or silver coins; as such, it corresponds to the tradition within economic thought known as metallism (cf. Schumpeter, 1954, pp. 288–299). Colorful images are invoked from pre-industrial times, when taxes were collected *in natura* and stored in warehouses and granaries. In official Swedish rhetoric, the state’s budget is often likened to a barn or a granary. The need to keep the “barns full” is a favorite phrase of Magdalena Andersson, who, before becoming Prime Minister in November 2021, served as the Social Democrat finance minister from 2014 to 2021. The image of the state budget as a grain storage makes spending more than taxing seem very reckless, to the point of threatening future survival.

In the sound finance view, the state is financially constrained by its income, just like a household. It can only spend what it first has collected in taxes. The constraint can be relaxed through borrowing, but only temporarily and at great cost, because debts need to be repaid with interest. The need to match spending with taxes can be postponed but never escaped. Only investments that can be expected to yield a financial return above the rate of interest are considered prudent. Just as the sound finance frame allows no distinction between a household and a state budget, no distinction is made either between private and public debt. The amount of money available for the state to borrow is determined by private lenders, who also set the interest rate. If the national debt becomes too high for their liking, they will demand higher rates and, at times, demand austerity to restore confidence in the state’s ability to pay. The possibility to “print” money is rejected as inflationary. Central bank policies to keep interest rates low through quantitative easing or yield curve control are seen as inflationary expressions of fiscal dominance.

The essence of the sound finance frame is succinctly summarized by Margaret Thatcher (1983) in her speech to the Conservative Party conference in 1983:

The State has no source of money other than money which people earn themselves. If the State wishes to spend more it can do so only by borrowing your savings or by taxing you more. It is no good thinking that someone else will pay—that ‘someone else’ is you. There is no such thing as public money; there is only taxpayers’ money.

Another influential point of reference can be found in Bill Clinton advisor James Carville’s depiction of the bond market as the most powerful force in society, which has to be placated through austerity, lest it punishes the economy with high interest rates. In Sweden, the paradigmatic expression is former Prime Minister Göran Persson’s mantra that “He who is in debt is not free,” and his book with the same name (Persson, 1997). Here, the conflation between private and public debt is complete. The way to escape the power of private bondholders, according to Persson, is not an activist central bank but to pay them back as soon as possible and avoid going into debt again.

The sound finance paradigm is built on common sense reasoning, but is augmented by academic macroeconomics (e.g., FPR, 2022) in which the household metaphor is considered as an accurate enough expression of the notion that the value of money is related to its relative scarcity. Inflation figures in the background, generally with an assumption of a 1:1 relation between spending and inflation, regardless of where spending is aimed. Usually, inflation does not have to be invoked, however. In the era under study here, inflation was persistently seen as a *too low*. Academic arguments for the sound finance frame are more often couched in political rather than economic terms, about how politicians need to be restrained (e.g., the Swedish budget law, which draws heavily on the school of public choice).

In the sound finance view, spending and taxing are done with an eye to keep a balanced budget, not to keep spending sufficient to maintain full employment. Unemployment is seen as beyond the scope of fiscal policy. It is seen as a problem of the personal characteristics of the unemployed or structural features of the labor market, not in macroeconomic policy. Solutions are not to spend more but to upgrade people’s skills through education or to lower their wages to make them more attractive to employers. Monetary policy is considered the appropriate tool to keep unemployment down, but there is a “natural rate” below which unemployment cannot go without sparking inflation.



## THE FUNCTIONAL FINANCE PARADIGM

The term functional finance was coined by the Keynesian economist Abba Lerner (1943). More recently, it is associated with the school of neo-chartalism or Modern Money Theory (MMT) (see, e.g., Mitchell et al. 2019; or Kelton, 2020 for a popular account). It is generally associated with Keynesianism, drawing on the long tradition in which money is not equated with a commodity but a token, given its value by state fiat. In the functional finance frame, money is a creature of law, of the state's charter. It corresponds to the tradition of economic thought known as chartalism (Schumpeter, 1954, pp. 288–299).

In the functional finance paradigm, tax money is not considered a scarce resource but something the state creates and destroys routinely at will, to ensure that all available real resources in the economy are fully utilized. Turning the familiar sequence of taxing and spending around, it holds that spending comes first, followed by the state taxing some of the money back. There is never an issue of running out of money. In the words of the New York Federal Reserve Board chairman Beardsley Ruml (1946): taxes for revenue are obsolete. The function of taxes is not to collect revenue but to ensure that there is demand for the currency. Taxing is done to reduce inflation, to influence behavior, to shape the distribution of income, or to achieve other social goals. The limit on spending is inflation, not the risk of insolvency.

Selling government bonds is not needed for financing purposes but is done as a monetary policy tool to enable the central bank to hit its interest rate target. The state can never find itself facing funding problems. The reserves that banks use to buy government bonds come from state spending to begin with. The interest rate is set by the central bank. As long as a state has its own currency with a flexible exchange rate and a central bank, private investors or “bond vigilantes” have no power to set rates.

The generative metaphor for money in the functional finance paradigm is not gold or other valuable commodities, like grain, but a token. Money is not intrinsically valuable, but gains value depending on the institutional context. It is determined by the power and capacity of the issuer, and its scarcity relative to the productive potential of the economy where it is used as a means of payment. Common similes include theater tickets or wardrobe tokens that are issued first and collected later. The purpose of collecting them is not to build a stash of tokens but to ensure compliance with the rules.

The functional finance paradigm cannot be said to have been fully institutionalized in Sweden, in part because of a long adherence to a fixed exchange rate. But it was influential during the Keynesian era. The central idea is summarized in the following words by leading Swedish economist Assar Lindbeck (1973, p. 67):

The task of fiscal policy, as we know, is *not* to balance the state budget but to balance the economy [...] The function of taxes is *not* to collect revenue for the state but to dampen demand in the private sector—in other words to ‘kill’ private purchasing power of goods, services, and labor [...] It is the expected availability of idle factors of production that determine whether there is room for expansive fiscal policy or not; and if the availability of idle factors of production lead to a budget surplus or deficit matters not one bit. [my translation; emphasis in the original]

In the functional finance frame, it is the responsibility of the state to ensure that there is enough spending to maintain full employment. In principle, this can be achieved through either tax cuts or spending increases. Because of inflation, most functional finance adherents advocate targeted public employment to reach those furthest from the labor market. This corresponds to Swedish labor market policy in the postwar era, during which up to a third of unemployed workers were referred to public works known as relief work (NLMB, 1966, pp. 37–38).

### INSTITUTIONALIZATION OF THE SOUND FINANCE PARADIGM

More than a mental frame, the sound finance paradigm is embedded in the institutions of the Swedish government. It is enshrined in the budget law and in a fiscal framework that mandates a budget surplus across the business cycle. There are no legal or constitutional obstacles to running an unbalanced budget—the power of budgeting is in the hands of parliament. But the fiscal framework exerts a strong normative pressure. It is safeguarded by government watchdogs like Finanspolitiska rådet (FPR—Fiscal Policy Council), Konjunkturinstitutets (NIER—the National Institute of Economic Research), and Ekonomistyrningsverket (ESV—the Swedish National Financial Management Authority). Several elements of the fiscal framework are open to interpretation, such as the definition of a business cycle or an output gap. A government’s spending plans can differ from those of fiscal watchdogs, but their estimates provide a powerful

anchor. At the municipal level, the national fiscal surplus target takes the form of a sort of autopilot austerity. Municipal budgets do not grow in line with inflation. If no deliberate spending increases are made, inflation-adjusted expenditures decrease every year. When immigration increases, it may well crowd out other expenditures, if not for economic then for political reasons. Prohibitions on bringing unemployment down through expansionary fiscal policy at the national level mean that immigration will result in an ethnic underclass of disproportionately unemployed immigrants. Segregation cannot be mitigated by building more housing. Social problems and crime go unaddressed. In a setting where the sound finance paradigm is taken for granted, these factors can be taken as proof that immigration is inherently burdensome.

### THE IMMIGRATION DEBATE IN SWEDEN

When Prime Minister Fredrik Reinfeldt urged Swedes to “open their hearts” to immigrants, he made it clear that they should expect a less generous welfare state in return. His finance minister Anders Borg announced that the increasing influx of refugees meant that there was no fiscal space for new spending. The announcement was welcomed by the Sweden Democrats as an early Christmas gift (SVT, 2014). Party leader Jimmie Åkesson commented on Reinfeldt’s speech by saying, “it has become very clear [...] that the choice is between welfare and continued large scale asylum immigration” (Hagren Idevall, 2016, p. 77).

Reinfeldt’s Social Democratic successors later flipped his argument: since they had restricted immigration, finance minister Magdalena Andersson said, this meant that more money would now be available for welfare. Still, costs remained. In 2016, the reception of asylum seekers was expected to cost the state SEK 70–80 billion per year until 2020 (SvD, 2016). Finance minister Andersson commented that, “of course, this means there will be less fiscal space to achieve other reforms.” Ulf Kristersson, the next leader of Reinfeldt’s Moderate Party, commented that this will “crowd out everything else if nothing is done.” The idea of a fixed pot of money, available for either immigrants or pensioners, is not restricted to the Sweden Democrats. It is canon in both political blocs. Although Jonas Sjöstedt, Vänsterpartiet (V—Left Party), criticized Reinfeldt’s rhetoric for accepting the same framing as the Sweden Democrats, as a choice between immigration and the welfare state, he did not voice any fundamental criticisms of the sound finance framework

(Hagren Idevall, 2016, p. 78). The reason there is no money for welfare, housing, or railroads, he said, is because of tax cuts.

An important element of the Sweden Democrats' narrative is the distinction between “makers” and “takers.” It is expressed through the state budget, by who pays taxes and who receives welfare payments. A letter to the SD-affiliated news site *Axpixlat* illustrates the narrative:

Why should I work when others get their money from the state? Why should I pay taxes to the state when that money goes directly into other people's pockets? Why should some people work hard all their lives only to end up with a lower income than someone who just arrived to the country, who has never worked, and never paid taxes?. (Hellström & Lodenius, 2016, p. 63)

Such attitudes can find support in official government reports. A report published by Expertgruppen för studier i offentlig ekonomi (ESO—the Expert Group on Public Economics), an independent research body under the Swedish Department of Finance, calculated that an average refugee costs SEK 74,000 each year (Ruist, 2018). The figure was calculated by measuring costs against tax receipts. Differences are large between countries of origin. Different groups have different “price tags.” One reason behind the cost, the report notes, is that it takes much longer for immigrants to enter the labor market than during the high-pressure economy of the 1980s. “It is doubtful whether it is possible to reach this fast employment integration again,” the report states, “as unemployment was kept low in the 1980s in a way that was not macro-economically sustainable” (Ruist, 2018, p. 7). In other words, using fiscal and labor market policy to return to full employment is not considered an option.

A report by the Fiscal Policy Council (Aldén & Hammarstedt, 2016) that focuses more closely on newly arrived refugees concludes that each refugee inflicts a cost of SEK 190,000 on the state budget during their first registered year in the country. Costs decline with time, but it is still around SEK 37,000 per year after the seventh year. The main reason is that a large number of immigrants are unemployed. Many refugees have low levels of education and traditions in which women do not participate in the formal labor market. The Fiscal Policy Council (FPR, 2022) does not consider unemployment among immigrants to be a problem that is solvable with more spending. It is not deemed to result from insufficient aggregate demand but “structural” factors that require targeted interventions (FPR, 2022, p. 41). In a previous era, targeted interventions could

have included direct public job creation, in the form of so-called relief work (NLMB, 1966). Now, it means education and efforts to lower the labor market entry barriers by addressing wages and regulations.

A 2022 report for Malmö municipality concludes that there are around 75,000 people living in the city who cannot support themselves economically (Eklund & Larsson, 2022). Most of them were born outside the country. The report shows that 72 percent of people with two Swedish-born parents are found to be economically self-supporting, but only 43 percent of people with parents born in non-western countries. The report's suggested measures to deal with the problem is to reduce welfare payments, thus increasing incentives for the unemployed to find work. Public works or other more traditional Keynesian measures are not considered. Although the report concerns the municipal level, where the local government is indeed dependent on tax revenues, it has become an influential reference point in the national debate.

Demographic arguments in favor of immigration are not uncommon. Swedish birthrates are low and many commentators agree that immigration is needed to maintain the welfare state in the long run. In the short term, however, there is agreement that immigrants impose a cost on society, certainly until they find employment. Since employment levels are constrained by the fiscal framework, a large share of immigrants will find themselves unemployed. In the Sweden Democrats' narrative, a distinction is often made between the "good" immigrants arriving in the old days when Sweden had a lack of workers and the "bad" immigrants who have arrived more recently and are often unemployed (Hagren Idevall, 2016). In 2022, macroeconomic policies to maintain a high-pressure economy where even uneducated immigrants can find employment are considered out of the question.

## DISSENTING VIEWS

There are a few dissenters from the sound finance view on immigration. Economist Erik Hegelund says that it does not make sense to talk about the cost of immigration (Lehnberg, 2014). To the extent that there is a cost, it is about unemployment, which is the responsibility of economic policy. Peo Hansen (2021) argues that the immigration debate would be well served to adopt a functional finance perspective. None of the dire warnings about the economic burden of immigration have come to pass, he argues. On the contrary, by forcing the state into a rare instance of

expansive fiscal policy, the 2015 immigration wave was actually an economic boon. Municipalities that had long been suffering decline received a fiscal boost from the central government. So far, these views are very marginal. Most critics of the fiscal policy framework begin by praising its achievements in the past. It was useful for its time, the story goes, but has since become obsolete. Such criticism cannot help but strengthen the sound finance paradigm.

### PERSISTENCE OF THE SOUND FINANCE PARADIGM

The persistence of the sound finance regime is, in many ways, path dependent. It became prominent in the 1990s, largely through the Social Democrats, and has since then become a major part of their brand and identity. The paradigm became institutionalized through a narrative about the economic crisis of the 1990s, in which sovereign debt was identified as the cause. The narrative is not only present in the Social Democrats' own telling of history, but in supposedly neutral journalistic accounts as well (e.g., Olsson & Rosén, 2022). One of the most immigration friendly parties in the Swedish parliament, Miljöpartiet (MP—Green Party), has been known to exalt the fiscal policy framework, holding it as a model for how Sweden could live within its carbon budget (Riksdagen, 2012). More recently, the party has begun arguing for an exception to the framework, however, to enable climate investments.

Certain anomalies have emerged that might challenge the sound finance paradigm, but they have so far been ignored or successfully explained away. The Euro-crisis showed that countries with large debts could face a dangerous spiral in which private lenders kept demanding ever higher interest rates. This was the takeaway among Swedish policymakers. Less attention has been paid to the fact that the European Central Bank (ECB) chief Mario Draghi could, with a few words, cool the markets and bring rates down toward zero. As shown by the ECB's (2022) recent crafting of an "anti-fragmentation tool" to close interest rate spread between Euro members, rates are determined by central banks, not private markets. In Sweden, only the first part of the story is told in public policy discourse. The finance minister often invokes it as an argument for fiscal prudence, at home or when lecturing other EU countries abroad (Hivert, 2020).

This second part of the story can appear in academic contexts. To reconcile the power of the central bank with the sound finance frame, a moral hazard argument is applied (Calmfors, 2013). Capping interest rates of

distressed countries in the EU periphery might prompt them to engage in even more fiscal recklessness in the future. Continuous bond buying will be required to keep spreads from widening. Such “intervention” can only be justified if there is a market failure: if lenders are mispricing yields on sovereign debt, causing a self-reinforcing spiral. The ECB can then step in to restore the “true” market price. Evaluating the proper role of the central bank in this manner involves an attempt to separate purely economic from political dynamics; underlying the sound finance frame is a market fundamentalist ontology. In the functional finance frame, assessing the price of a financial asset as if the central bank backstop did not exist is not a meaningful exercise. The role of political entities is fundamental to the monetary system.

A second anomaly is the Covid-19 pandemic, when developed country governments everywhere were able to spend vast sums of money without having “saved up” fiscal space in the form of low sovereign debt. Swedish Finance Ministers still claim that Sweden’s powerful fiscal response to the pandemic was only made possible by previous prudence (Olsson 2021b; Damberg, 2022). Economists at Swedbank question this narrative by pointing to the international context (Wallström et al., 2020), to little effect. To believers in the sound finance paradigm, the pandemic rather reinforced it.

Another anomaly is Japan, a country with a 250 percent debt-to-GDP ratio and interest rates close to zero, simply because the Bank of Japan (BOJ) chooses to keep them there. Articles can be found in the Swedish financial press about the BOJ’s policy of “yield curve control,” presented mainly as a threat to investors (Åkerman, 2020), but there is scarcely a mention of what the Japanese example might mean for fiscal policy in Sweden in other media.

In their 2022 report, the Fiscal Policy Council (FPR, 2022) warns that respect for the fiscal framework is waning. Even if this is unlikely to lead to a wholesale rejection of the sound finance frame, it might lead to a softening. Social Democrats are known to abruptly change long-held positions. Their about-face on immigration is one example; their change with respect to NATO membership is another. Improbable as it may seem, one day they might also change their mind about the sound finance paradigm. But there is no reason to expect it to come from a mere change in factual circumstances, as facts can be reconciled with a wide variety of frames. It would take the diffusion of alternative ideas, mobilized through public pressure for this to happen.

## CONCLUSION AND DISCUSSION

This chapter has made the case that the cosmopolitan consensus in Sweden collapsed so quickly because it lacked a strong economic foundation. The public debate is framed by a paradigm in which tax money is considered a scarce resource, setting up a perceived trade-off between immigration and the welfare state. As long as immigration was modest, sacrificing the welfare state for moral reasons could be seen as a viable political option, but attitudes changed when immigration increased. More than just a frame for public debate, the sound finance paradigm is institutionalized in Swedish economic policy. A fiscal framework inhibits large-scale public spending to accommodate population growth and maintain full employment. Problems caused by immigration go unaddressed. A class of unemployed immigrants in segregated areas with social problems and crime has emerged. With fiscally expansive policy off the table, these problems are blamed on the personal characteristics of immigrants, rather than a macroeconomic policy failure.

The idea that government welfare payments come from a stream of tax revenue creates a mental image in which high-income earners fund the welfare state, while low-income earners are a drain. Immigrants, who have disproportionately low incomes, are perceived as parasitic. The logic leads to calls for welfare chauvinism. Only those who have “paid in” to the state coffers are deemed worthy of receiving benefits in return. The idea is given scientific gloss by official government bodies like the Expert Group on Public Economics and the Fiscal Policy Council. Their calculations are built on the premise that tax payments determine whether a person contributes to the welfare state or detracts from it. There may be no reason to question the validity of their numbers but switching to the functional finance frame would prompt questions about their relevance.

In the sound finance frame, high-income earners uphold the welfare state. In the functional finance frame, the logic is the opposite. Taxes do not serve to finance state expenditures but to reduce purchasing power to dampen inflation. If people already have low incomes and purchasing power, the need for inflation-dampening taxes becomes less pressing. High-income earners, on the other hand, pose an inflationary threat that needs to be neutralized. They take up fiscal space that could have been used by the welfare state. Those who work for low wages contribute their labor to society without exerting a commensurate inflationary pressure in return. If they are unemployed, the fault lies with a lack of fiscal and active



labor market policy. Immigrants receiving more in benefits than they pay in taxes does not mean that there is less in a fixed pot of money available for others. It means that employment levels and wages are too low, which can be remedied by expansionary fiscal policy or public employment.

It is easy to see why the zero-sum framing is useful for political actors who want to capitalize on anti-immigration sentiment: it allows their preferred policies to win by default. It is harder to explain why the scarcity frame is also used by those who favor immigration, like the Green Party. The theoretical concept of policy paradigms can be useful to explain this puzzle. Policy paradigms consist of taken-for-granted assumptions about how the world works. They make certain policy proposals seem reasonable and others inconceivable. The sound finance paradigm is institutionalized in respectable government agencies and academia, making it hard to refute or even acknowledge. Policy paradigms and their associated narratives explain how political ideas and practices persist across time and political divides, by turning potentially controversial ideas into common sense.

Modern societies pride themselves of having “rational” political and economic institutions that make policymaking a matter of applying of straight-forward means–ends measures to an objective reality (Dobbin, 1994). But rationality itself is socially constructed. What is deemed rational differs between countries and time periods. State concertation may be considered rational in France, while promoting competition is considered rational in Germany. Prevailing ideas about how to govern modern societies are no less socially constructed than the meaning systems of the so-called primitive societies studied by anthropologists. As Frank Dobbin (1994) argues, social scientists should approach the prevailing assumptions of their own culture with the same detached skepticism. Life-long cultural immersion makes that difficult, of course. Fish are not wont to comprehend water. The two frames, just like all ideal constructions, are products of culture and should be viewed that way. This chapter can be seen as an appeal for participants in the immigration debate to take fundamental macroeconomic questions seriously. There is no other way to ascertain whether, and to what extent, there is, in fact, a trade-off between immigration and the welfare state.

Needless to say, switching from the sound finance paradigm to the functional finance paradigm would not be sufficient to create a more sustainable cosmopolitanism, even though it may be necessary. Money alone does not solve everything. Investments take time to pay off. The difference would be that the debate would move on to real resources.

Immigration does pose a trade-off at certain points and under certain circumstances but figuring out where the line goes is not a straight-forward matter. Invoking resources constraints is an easy way to appear realistic and hard-headed. Determining the true nature of those constraints is exceedingly difficult, however. It requires granular analysis of industries, supply chains, and their interrelations.

At a fundamental level, ideas about economic sustainability of immigration turn on ideas about inflation. Proponents of the sound finance frame might say that the best policy to fight inflation is to keep public spending to a minimum. This assumes a 1:1 relation between spending and inflation regardless of where spending is aimed, thus eliding complex questions about the relation between money, balance sheets, production, capacity utilization, and resource constraints. Inflation can result from both excessive demand and inadequate supply. Starving the economy of aggregate demand and, hence, investment is likely to result in a more inflationary environment later on. These questions have become acutely relevant with the economic disruptions in aftermath of the Covid-19 pandemic.

Schumpeter (1954, pp. 288–299) observed that the rival schools of metallism and chartalism have competed since the days of Plato and Aristotle. Perry Mehrling (2013, p. 9) sees a dialectic between them, each emerging in different economic circumstances: metallism in response to excessive money printing and chartalism in response to recession. Inflation is often blamed on money printing; thus, if Mehrling is right, the inflation of the early 2020s might lead to the reinforcing of metallist, or hard money, ideas.

The role of supply-side disruptions in the inflation of the early 2020s makes any straight-forward arguments about overheating difficult to sustain however. Even frugal countries like Sweden, with a debt-to-GDP-ratio of 35 percent, have not been able to escape inflation rates of around 8 percent. In contrast, Japan, with a debt-to-GDP ratio of 250 percent, has seen only an increase in inflation to around 2 percent.

It is hard to know whether the Covid-19 pandemic will undermine or strengthen the sound finance paradigm. Early in the pandemic, forceful fiscal responses in various countries with differing levels of debt could be seen as evidence that the sound finance frame was misguided. It did not seem to matter if a country had a debt-to-GDP ratio of 35 or 250 percent. In the short term at least, governments could seemingly spend however much they wanted anyhow. International outlooks do not figure prominently in national politics and in Sweden, the pre-pandemic austerity soon

came to be seen as a necessary condition for the fiscal expansion during the crisis. The subsequent burst of inflation might also make appeals for fiscal expansion even more difficult.

On the other hand, the role of supply-side constraints behind rising prices demonstrates that inflation is only loosely connected with general levels of public spending, deficits, and debts. Price pressures arise from bottlenecks in specific sectors. Covid-19 caused global semiconductor supply chains to break down and labor shortages to emerge amid high unemployment. Inflation stemming from such problems cannot be averted by tight fiscal policy. In an era of economic constraints, abstract economic reasoning about general output gaps may have to give way to a more targeted approach, focused on solving concrete problems. If the functional finance paradigm should make a comeback, it would most likely have to be accompanied by other supply-side measures from the postwar era. Simplistic “pump priming” to increase private spending would overheat the economy. Public employment and active labor market policies would likely be needed to employ those who are furthest from the labor market without stoking inflation (cf. NLMB, 1966; Olsson, 1963).

Ultimately, as the theory of policy paradigms indicates, policy debates are not won by facts but by how they are interpreted (Malm Lindberg, 2023, this volume). Neither side of the debate has any difficulty coming up with explanations that fit their paradigm. The sound finance frame in Sweden draws its strength from a narrative about history. According to prevailing lore, the Swedish economy of the 1990s was threatened by a huge public debt and it was saved by political efforts to bring it down. From the functional finance perspective, this would be like blaming a car crash on the airbag. The initial cause of the crisis was the bursting of a credit bubble, and public debt increased to absorb the shock. By reducing this support, unemployment increased and has never again returned to the low levels of the postwar era. It is not easy to see how such an opposing narrative could gain ground. For that to happen, the historical narrative and intellectual foundation of the sound finance paradigm would have to be discredited.

Anti-immigration sentiment does not appear quite as strong as it was in the mid-2010s. Although a 2020 opinion poll of Swedish voters found that only 8 percent of respondents wanted to increase immigration (Thurfjell, 2020), following the outbreak of war in Ukraine, it turned out that there was room for more immigrants after all: 80 percent responded that Sweden should accept Ukrainian refugees (Göthlin, 2022). A poll in

May 2022 found that Swedes exhibit an increased openness to immigration, not just specifically to Ukrainian refugees but in general (Rosén, 2022; but see also Bucken-Knapp & Zelano, 2023, this volume). Whether this leads to a more permanent shift remains to be seen. A new framing of the issue—and the policy recommendations that flow from it—could lead to a more sustainably cosmopolitan future. Otherwise, the increase in support may prove transitory.

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# Binds and Bridges to Protection in Crisis: The Case of Unaccompanied Refugee Youth from Afghanistan in Sweden

*Gregg Bucken-Knapp*  and *Karin Hjorthen Zelano* 

## INTRODUCTION

Since 2018, approximately 9000 refugees in Sweden who arrived as unaccompanied minors, but who had their asylum applications rejected, have had the opportunity to remain in Sweden on short-term permits if enrolled in educational programs. The policy, known as Gymnasielagen, or the “High School Law,” allows for these young refugees to receive permanent residency if employment of a certain duration is found within six months

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of completing their education. The outbreak of the Covid-19 pandemic in 2020 made this possibility exceptionally difficult for most young refugees, as companies throughout the Swedish labor market minimized hiring and furloughed substantial numbers of staff.

The national economic challenges that resulted from the pandemic were highly salient in the Swedish media, as well as for policymakers and the general public. Like legislative bodies in many other advanced industrialized states, the Swedish parliament passed historically expansive support packages, providing much-needed assistance to both specific industries and sectors, in a bid not just to support producers, but to minimize the potentially profound financial effects of the pandemic on everyday people. Yet, the adoption of such ambitious and innovative policy reforms was not extended to the case of unaccompanied minors present in Sweden as part of the High School Law. Indeed, the issue was hotly debated in the Swedish media and on the floor of the Swedish parliament throughout 2020 and 2021. A proposed reform to the law, which would have provided a modest improvement in the opportunities for these refugees to secure employment and remain in Sweden, was rejected after highly publicized debate.

This chapter primarily details how this proposed piece of legislative reform—which would have granted eligible refugee youth both more time to locate employment and with a shorter employment contract—was framed by Swedish political parties throughout 2020 and 2021 before it was rejected. We begin by putting the empirical spotlight on relevant debates in the Swedish parliament and, to a lesser extent, comments made by politicians in the Swedish media. While some Swedish politicians sought to frame the problem in terms of compassion toward refugees, as well as a related critique of legally unsound asylum decisions, such arguments were very much in the minority. In contrast, most Swedish political parties side-stepped the issue of the employment (and deportation) challenges faced by refugee youth present in Sweden through the High School Law. Rather, they sought to portray the situation as one in which the proposed policy reforms would undermine the sanctity of the asylum determination process (for an interesting contrast, see Malm Lindberg, 2023, this volume, on the gap between policy and implementation).

Yet, policymakers may enact legislation that would offer protection to individuals whose asylum claims have been rejected or whose situation does not meet anticipated formal criteria; for example, in terms of documentation. To identify whether there are traits associated with this group

of young refugees that may have disadvantaged them in the eyes of the Swedish parliament when considering beneficial reform, we consider two later debates among Swedish policymakers regarding refugee reception: that of Afghanistan following the return to power in late 2021 of the Taliban, and that of Ukrainian refugees in the face of the Russian full-scale invasion of Ukraine in February 2022. We argue that young refugees in Sweden subject to the High School Law are viewed in less positive terms by many political elites—thus less deserving of specific policy reform measures—for two reasons: they are male and they are associated with a conflict that is both comparatively remote in time and place.

In the case of refugees fleeing Afghanistan, Sweden's strong commitment to gender equality was particularly pronounced in framing the need to admit refugees. In the case of Ukraine, the ongoing wide-scale Russian invasion of Ukraine highlights the importance of interrelated factors: temporality, scope, geography, and, to some extent, gender. Across the Swedish political spectrum, the 2022 Russian invasion of Ukraine is characterized as resulting in an immediate challenge in the form of a vast number of refugees, all of whom are not only at the European Union's door, but whose legal access is guaranteed by the European Commission's March 2022 implementation of the 2001 Temporary Protection Directive (EC, 2022).

### SWEDEN: AN IDEATIONAL CONTEXT OF EXCEPTIONAL UNIVERSALISM, GENDER EQUALITY, AND REGULATED IMMIGRATION

Institutionalist scholars highlight the central role of ideas in policy processes and change (cf. Béland, 2009). The point is that, in addition to purely materialist conditions, policy change and policy stability are better understood with attention to ideas about reality and the issue at hand. In the case of migration policy in Sweden, such ideas include the norm of gender equality and the universal benefit structures as the basis for social cohesion and trust.

In 2015, Sweden became the first country ever with a self-declared feminist government, with an exceptional and explicit dedication to pursue a feminist foreign policy (Aggestam & Bergman-Rosamond, 2016; Aggestam et al., 2019). Towns (2002) shows how the articulated and conscious political self-branding of Sweden as gender equal paradoxically

came to accentuate divisions within the state, most prominently between immigrants and Swedes. In the wake of increasing refugee reception in the 1990s from Iran, Iraq, and the former Yugoslavia, the Other increasingly became synonymous with the immigrant male of a patriarchal culture, often contrasted with the gender equal and modern Sweden.

A constitutive part of the Swedish state's self-identity is the idea of Sweden as a humanitarian super-power (Dahl, 2006; Aggestam & Bergman-Rosamond, 2016). The commitment to norms of human rights is explained by pure pragmatism and by a rooted commitment to universal values entrenched in the social democratic welfare state (Towns, 2002; Aggestam et al., 2019; Karlsson Schaffer, 2020).

In addition to the internationalist component, the social democratic welfare state is articulated on the basis of fairness, equality, and solidarity. The idea of reciprocity is what motivates, for instance flat rate universal benefits to all rather than needs based, targeted support of the kind more common in liberal welfare systems (Rothstein, 1998). The perception of the state as just is presented as the main reason for, in international comparison, the high willingness to pay taxes in Scandinavia and low corruption rates.

These principled foreign policy stances, both in terms of gender equality and humanitarianism, as well as the importance of a welfare statement whose institutional practice emphasizes equal treatment, are important underlying contexts for making sense of the lack of success facing proponents seeking to reform the High School Law.

### *Research Design and Methodology*

We are inspired by a broadly interpretivist policy framework emphasizing the overall relevance of case-specific context (Boswell et al., 2019) when contrasting refugee reception from Afghanistan and Ukraine with that of unaccompanied refugee youth subject to the High School Law. As Wagenaar notes, interpretivist policy analysis, as a written product, is often difficult for the reader to penetrate, stronger on dense theory, and weaker on clear empirical application. Yet, Wagenaar (2011, p. 9) stresses that it need not be that way, putting the point directly,

[i]n my opinion, the issue is at heart clear and simple. Interpretive policy analysis is always an interpretation *of* something: people acting, fighting, communicating, negotiating, experimenting, and so on.

At the same time, many interpretivist policy scholars emphasize a comparatively stringent approach to data collection and analysis. By contrast, we share the view of those who view this methodological stance as advocating “a truism or a concession too far to positivism” (Marsh, 2015, p. 231). Rather, we subscribe to an interpretivism that affords place to key features of context that can assist in understanding policy choices and consequences. As Bevir and Kedar (2008, p. 506) note, we “cannot explain social phenomena adequately if we fail fully to take into account both their inherent flux and their concrete links to specific contexts.” A more idiographic approach to case description and comparison may, of course, feel alien or even antithetical to those who chiefly put trust in structured comparisons. Yet, we share the conviction of Rhodes (2014, p. 321) that “small facts speak to large issues” when considering what may be significant in cases. To that end, we align ourselves with the subset of interpretive policy scholars emphasizing *impressionism* as a methodological virtue, particularly the claim that interpretivist approaches—while emphasizing methodological coherency—need not be carried out in a systematic application of method (Boswell & Corbett, 2015).

Against that backdrop, the chapter makes a specific contribution to the broader migration policy literature: through an impressionistic analysis, we demonstrate how deeply internalized societal norms regarding gender, or the sudden presence of a large-scale group of refugees at one’s own regional door, inevitably results in either an implicit or explicit definition of which categories of refugees are seen as deserving of protection. Quite simply, political and societal advocates on behalf of refugee youth in Sweden subject to the High School Law are unable to mobilize salient norms that would persuade their claims for safety and security to be seen as a priority.

This chapter contrasts the political debate about the requirements for permanent residence of unaccompanied minors during the Covid-19 pandemic with the political party discourse focusing on refugees during the aftermath of the Taliban takeover in 2021 and the war in Ukraine initiated in 2022. The chapter relies on three types of data: (1) parliamentary records, (2) op-eds in major newspapers, and (3) social media statements on Twitter. The parliamentary records were identified using the search term “gymnasielagen.” In the other two cases, the search terms were “Afghanistan AND asyl” or “Afghanistan AND flykting\*” and, simply “Ukraina.” For statements in news media, we used the Medicarkivet database. After a first selection of documents, relevant sources were imported

to Nvivo software for reading and the development of broad thematic coding, with a particular emphasis on preferential treatment, gender and gender equality, as well as gender equality and humanitarian initiatives.

## INTRODUCING THE CASE: REFORMING THE HIGH SCHOOL LAW

As mentioned above, the proposed amendment to the initial High School Law—intended to compensate affected individuals for the deteriorating labor market situation during early days of the Covid-19 pandemic—generated substantial political debate, despite a proposal of only marginally easing criteria for permanent residency for a notably small group of approximately 9000 individuals (Swedish Migration Agency, 2020). This section details the key arguments characterizing the debate, relating those to the ideational context of Swedish migration and integration policy formation (see also Jerneck, 2023, this volume).

### *Pandemic as a Moment of Opportunity Versus the Sanctity of Asylum Decisions*

Initially, the proponents of the amendment tried to argue that the amendment was a logical consequence of the pandemic, similar to other labor market policy adjustments being made. In a migration policy debate, one Miljöpartiet (MP—Green Party) member of parliament, Rasmus Ling stated that “[e]xceptional measures are being taken in all kinds of areas” (Riksdagen, 2020), with a similar line of argumentation advanced by a member of parliament from Vänsterpartiet (V—Left Party):

Now, in the midst of the corona crisis, it is obvious that the government and the Riksdag need to take the same responsibility for the consequences of Covid-19 as they do in other areas. This means, among other things, to make sure that people are not deprived of their opportunity to live with their families if family members lose their jobs and that the children and young people who are now affected by fluctuations in migration policy, legal uncertainty, and now the corona crisis have an opportunity to stay.

Christina Høj Larsen, (V) in parliamentary debate. (Riksdagen, 2020)

Those who wanted to pass the amendment found themselves faced with the task of defending the original High School Law, which was highly criticized at the time, as well as the amendment itself, needing to respond to criticism from parliamentary opponents such as Moderaterna (M—Moderate Party) Member of parliament Malmer Stenegård who stated, “[o]ne refers to Covid-19, but many of these parties were pushing for an amnesty or change in the High School Law already before the virus hit us” (Riksdagen, 2020).

The opponents of the amendment focused their attention on one thing: the legitimacy of the individuals’ claim to asylum in the first place in combination with a highlighting of the dangers of “special legislation” favoring a particular group of people. Liberalerna (L—the Liberal Party) noted this in an April 2021 parliamentary motion, stating that,

[w]ith the series of High School Laws the government has tailor-made a special legislation so a certain group of people, that according to court decisions lack grounds for protection and that are today adults, may stay in Sweden anyways. (Riksdagen, 2021a)

In calling for a more sustainable approach to migration policy over the long term, Centerpartiet (C—the Centre Party) also highlighted concerns over preferential treatment, noting that, “the proposed legal changes risk to be unfair and only apply to certain people” (Riksdagen, 2021b). Sverigedemokraterna (SD—Sweden Democrats) member of parliament Julia Kronlid asked rhetorically how the situation of unaccompanied minors differed from others who were regarded as legally lacking the basis to remain in Sweden, observing pointedly that,

[h]owever, it is no more a pity for that group [unaccompanied minors] than for others who have no reason to stay in Sweden. If you have no reason to stay in the country, you need to leave the country. (Riksdagen, 2020)

*The Double Bind of Unaccompanied Refugee Youth  
from Afghanistan: Gender and Distance to Conflict*

The unaccompanied refugee youth were frequently identified not just by their formal status—as asylum seekers whose claims had been rejected—but specifically as *male* asylum seekers whose claims had been rejected. This, in and of itself, would not be of any analytical interest if both

proponents and opponents of policy reform had mobilized gender as an element of overall discursive strategies. Yet, this is not the case. It was primarily opponents of the policy reform measure that emphasized gender. In doing so, we argue that opponents were strategically tapping into norms within Swedish society that have to do with gender equality as an overarching and widely-shared societal objective (Towns, 2002; Aggestam et al., 2019), as well as more general racist arguments that characterize male Muslim migrants as societal and personal threats (Wigger, 2019). In terms of conflict situations, the gender equality norm is especially visible (and, indeed, its objectives are overwhelmingly supported by conflict research; see Carpenter, 2005) in the form of policies and measures designed to ensure that the needs of vulnerable girls and women are explicitly identified, prioritized, and met (Aggestam & Bergman-Rosamond, 2016; Aggestam et al., 2019). By emphasizing the gender of these refugee youth—even in passing—reform opponents were able to highlight implicitly that the benefits would not be women or girls, but men. At the same time, by emphasizing their maleness, reform opponents were drawing upon a virulent racist discourse that had quickly taken root in 2014 and 2015: that refugee men from Syria and Afghanistan constituted a threat to national security, public order, and, often, the physical safety of white Western women (Burrell & Hörschelmann, 2019).

Throughout 2020 and until June 2021, in both the Swedish parliament and in the Swedish press, opponents of policy reform would identify a rather narrow set of characteristics when discussing the presence of Afghan refugee youth in Sweden. Chief among these was gender, labeling them as “unidentified, adult males.”

In addition to the importance ascribed to a sustainable migration policy and the perils of giving “preferential treatment” to a particular group, one of the most notable features in a majority of statements from opponents to the amendment was the repeated description of the affected individuals as male, unidentified, or with unverifiable identities from Afghanistan; all of them ultimately referred to as “young men of unclear identity,” by Julia Kronlid, member of the Swedish Democrats (Riksdagen, 2020), “young adults without ground for asylum” by Malmer Stenegård, member of the Moderate Party (Riksdagen, 2020), and “young men with unverified identity and without grounds for protection” (Christian Democrats; Riksdagen, 2021c).

Indeed, the emphasis on these young refugees specifically as men was, at times, made in relation to Swedish norms of gender equality. As one

example, the chair of Kristdemokratiska Kvinnoförbundet (KDK—the Christian Democratic Women’s Organization), Sarah Havneraas, wrote an op-ed for the Swedish tabloid *Expressen*, where she posed the rhetorical question of why a special solution was necessary for men, stressing that:

it is the groups that are most in need of protection that are disadvantaged by today’s migration policy. It is not morally defensible. If Sweden has the opportunity and capacity, why is it possible to produce special legislation similar to the High School Law to protect young men who lack protection reasons, but not regulations or laws that benefit the most vulnerable groups who need our help the most? The feminist government often problematizes the gender differences that exist within occupational groups in the labor market. Then it is suddenly absolutely vital that there is a 50/50 distribution between the sexes. But when it comes to the skewed gender distribution of migration policy, the government insists on closing its eyes. (Havneraas, 2020)

In addition to preferential treatment for men, either implicitly or explicitly, being framed as inconsistent with Swedish gender equality norms, reform opponents regularly aligned themselves with a racist discourse prevalent in dominantly white Western societies: that non-white male migrants constitute multiple forms of threat to security, order, and physical safety. As Sager and Mulinari note, this type of rhetoric is central to framing by the Sweden Democrats when highlighting threats associated with non-Western migration. Quite simply, the party presents a narrative in which “dangerous Muslim others” constitute a threat to vulnerable Swedish women, who can only be protected by the “white/male SD savior” (Sager & Mulinari, 2018).

## THE TALIBAN TAKE POWER AND THE RUSSIAN FULL-SCALE INVASION OF UKRAINE

The Taliban offensive in Afghanistan during the summer of 2021 led to the sudden and dramatic evacuation of international diplomatic personnel, foreign citizens, and many Afghans who had worked with foreign militaries, diplomatic services, and international organizations. Sweden was no exception in this regard. Between June and December 2021, debate in the Swedish parliament centered on the nature of Sweden’s evacuation from Afghanistan, the humanitarian conditions inside Afghanistan, and how Swedish humanitarian aid should be organized in the future. A central



issue discussed was how to prevent a humanitarian crisis without legitimizing the Taliban regime, with a particular focus on the situation for girls and women in Afghanistan, as noted by Social Democratic Minister of Justice and Migration Morgan Johansson:

You have all followed the media development and seen what it has been like in Afghanistan, not least at the airport, in recent weeks and how difficult it has been to get people out. This work will naturally be continued. But it is a fundamentalist darkness that descends over the country, so one understands very well that there are many who want to leave the country. And the religious fundamentalism mainly affects women and children. Many are desperate. Many want to leave. And our main message is still that Sweden and the EU have an important role to play in helping those who are now in acute danger. (Riksdagen, 2021d)

In an answer to a written member of parliament question focusing on Sweden's feminist foreign policy and the situation in Afghanistan following the Taliban takeover, Socialdemokraterna (S—Social Democrats) Minister Ann Linde underscored that the government was keeping a close eye on the situation regarding Afghan women fleeing the country and arriving in Sweden:

Recent developments in Afghanistan are deeply worrying, especially for women and girls. Sweden has paid special attention to their situation in the evacuation of Afghans in need of protection. Of the 612 who have arrived as quota refugees, and will be processed for residence permits, 75% are women and children (459). This group also includes human rights defenders, including women's rights defenders. (Riksdagen, 2021e)

Speaking several days later, September 13, at a parliamentary debate also addressing feminist foreign policy and the situation in Afghanistan, Linde once again highlighted that Sweden should prioritize support for Afghan women, though this time focusing on those who had not left the country:

It is also important that we find ways to support those who remain in Afghanistan. If all the well-educated are taken from there, the future will be even more difficult for Afghanistan. However, we must be assured that they can remain and be supported both in humanitarian and in other ways, and

now more and more attention is being paid to the possibility and security of, not least, women, to continue operating in Afghanistan. (Riksdagen, 2021f)

More specific calls to support Afghan women by facilitating their ability to come to Sweden as quota refugees was voiced at the same debate by Left Party member of parliament Håkan Svenneling, who urged the government to double the number of quota refugees:

The chaotic evacuation began too late and left many who helped us and who needed our protection. We must now take responsibility for to protect all human rights defenders, women's rights activists, journalists, and interpreters who remain in Afghanistan and who are now at risk of being tortured and killed by the Taliban. Sweden must therefore immediately increase the reception of quota refugees from 5,000 to 10,000. (Riksdagen, 2021f)

While such debate did not lead to concrete proposals to privilege admitting Afghan woman as quota refugees at the expense of men, they are nevertheless indicative of the policy priorities of the Swedish state at the time. Afghanistan was indeed an important foreign policy concern for Sweden with the return of the Taliban to power, but it was women whose vulnerable situation was made most salient by policymakers.

The consequences of the Taliban takeover of Afghanistan were quickly overshadowed when the Russian full-scale invasion of Ukraine took place on February 24, 2022, producing the largest refugee events in Europe since World War II. Of particular note is the demographic composition of these refugees and internally displaced people. While the elderly is an especially large category among the internally displaced, they are oftentimes unable to weather the challenges associated with fleeing abroad. Shortly after the wide-scale invasion began, the Ukrainian government implemented a policy prohibiting men between the ages of 18 and 60 from leaving the country. As such, Ukrainian refugees are predominantly women and children, with international aid organizations estimating that roughly one-half of those who have fled Ukraine are children (UNHCR, 2022).

The outpouring of Western support for Ukrainian refugees, particularly within the European Union, was substantial. Here, we highlight how the question of Ukrainian refugees was framed by Swedish politicians. We do so, not as an end in and of itself, as a contrasting case to that of the unaccompanied refugee youth. We aim to demonstrate that this instance of

refugee reception has taken on a particular level of salience that vastly eclipses how unaccompanied refugee youth from Afghanistan have been seen and that it is not only the scope of the crisis that has caused refugee reception to be regarded as a near-societal mandate. In addition to the sheer volume, the geographic proximity of Ukraine to Sweden, both parts of Europe, has figured very broadly in the framing. To a lesser extent, and from different sides of the political spectrum, cultural factors (for the anti-immigrant far right) and gender (for the pro-refugee reception left and center) have also been drawn upon to frame why it is that refugee reception is such a sudden imperative.

For the first time, the European Commission implemented the 2001 Temporary Protection Directive. Adopted in the wake of the Balkan wars, the directive is intended to remove pressure from national asylum application processing systems in instances where mass refugee events take place. The directive allows for a designated group of refugees to receive a maximum three years of temporary protection in the European Union, consisting of a joint residence/work permit, access to education for children, emergency healthcare for adults, complete healthcare for children, free housing, and modest financial assistance (EC, 2022). The implementation of the directive shows that when there is political will at the European level, quick and comprehensive solutions can be put into place to provide real protection to a substantial number of refugees.

Even within EU member states, the level of political and public support spans the political spectrum as a whole, with there being no meaningful opposition to the adoption of the directive.<sup>1</sup> In Sweden, the rhetoric from political parties mirrored that of what was being expressed across Europe: that this is a time of profound crisis, essentially unparalleled in scope, which requires that Sweden do its part to assist in providing a safe harbor to those fleeing. In the immediate days following the full-scale Russian invasion, Swedish politicians stated unequivocally that asylum for Ukrainians was of the utmost importance. Such pronouncements were, of course, common among those political parties in Sweden that had an ideational (if not always programmatic) stance in favor of generous refugee admission policies. Per Bolund, one of the two spokespeople for the Green Party and a former Deputy Prime Minister until November 2021, was unequivocal in highlighting the importance of asylum being granted in the face of war:

<sup>1</sup>Denmark is an exception in that it is not required to implement the directive.

This is a time when people again are fleeing across our continent, through Europe. The right to asylum once emerged from the experiences of the Second World War. People whose life and safety are threatened always have the right to protection. (Riksdagen, 2022a)

A similar sentiment was expressed by Annie Lööf, leader of the Swedish Center Party. While the Center Party ultimately opposed the proposed reforms of the High School Law, the party generally has a reputation in Swedish politics as one of the few that is willing to support initiatives allowing for more generous refugee admissions. Speaking in rather prosaic terms, Lööf stated:

We will defend the right to seek asylum and get protection when one tries to escape a war only two hours flight from Sweden. We have to, alone and together with EU, send the solidaristic signal to the people in a Ukraine of chaos and war. When freedom, safety and future is shattered, we stand united with open arms for protection and safety. (Riksdagen, 2022a)

Of particular note in Lööf's remarks is the reference to the comparatively small geographic distance from Ukraine to Sweden—that the war was taking place “*only two hours flight from Sweden.*” Indeed, this reference to proximity is far from isolated. Speaking the same day as Lööf and Bolund, Swedish Defense Minister Peter Hultqvist first addressed the immediate implications of the war for peace and security in Europe, while also underscoring the physical proximity of the war as a reason for why it was especially significant for Sweden:

Their struggle is also ours. Russia and its regime is threatening the European security order, it is our right to make our own choices, make our own decisions, and live our lives in peace and security [...] Ukraine is a neighboring country to our neighboring countries, that is 1,200 kilometers from here. That is not a long distance. Today, that is a short distance. (Riksdagen, 2022a)

The willingness to welcome Ukrainian refugees to Swedish soil was not simply limited to the parties of the center-left. Shortly before the Temporary Protection Directive took effect, the leader of the center-right Moderate Party, Ulf Kristersson, was interviewed on Swedish state television about what the appropriate policy should be, stating that:

All EU countries will need to admit very many Ukrainians. In the best case, this will only be for a period of time and they will be able to return again to a free and peaceful Ukraine. (SVT, 2022)

The interviewing journalist was quick to point out that Kristersson's remarks suggest a reversal of party line on the refugee question, which was decidedly restrictive in the late 2010s. Kristersson dismissed that there was a contradiction in the stance of the party, stressing that, “[w]hen we have a war in Europe, there are lots of things that no longer apply.”

While Kristersson's remarks met with some pointed criticism in social media of flip-flopping, the charges of hypocrisy were mild in comparison to those that were leveled against the traditionally anti-immigrant Sweden Democrats, who first gained seats in the Swedish parliament with 5.7% of the popular vote in 2010 but are the third-largest party in 2022 in most opinion polls, hovering between approximately 18 and 20%. In an early March 2022 interview with the public service broadcaster Sveriges Radio, Sweden Democrats foreign policy spokesperson Aron Emilsson explained why it was that the party supported activation of the Temporary Protection Directive, highlighting not only the relevance of geographical proximity, but what the party saw as cultural similarities between Ukraine and Swedish society, as well as the differences between the current case of refugee reception and those from Afghanistan and Syria:

We take responsibility when a country that is geographically and culturally close to us is set on fire. We do this through acute humanitarian support and do what we can to help internally displaced peoples in large numbers, but also refugees that have gone to Poland and other neighboring countries, as well as when it comes to the capacity of those who make it all the way here [...] The difference is that Ukraine is Europe, it is a part of our geographical and cultural local area, and we maintain that we have a higher moral and practical responsibility and ability to admit (refugees) from Ukraine, there is another type of reasonableness in the priority of doing so. (SR, 2022)

As a result, the Sweden Democrats immediately came under substantial criticism and scrutiny for supporting Ukrainian refugee reception, particularly on the basis of alleged cultural similarities. In an attempt to stave off criticism, the party leader, Jimmie Åkesson, sought to reframe the support as being entirely consistent with the party's previous emphasis on linking

refugee admission to available resources and also expecting that protection would only be temporary in nature:

I have said that, of course, we will house people from Ukraine based on the capacity that we have. But we will not, as has been the case for decades now, integrate those people that come. Rather, they will be here to get temporary protection and then, as soon [as the situation] has stabilized, they will return to Ukraine. (Ageman, 2022)

Gender is a significant factor when Swedish politicians have sought to call attention to the importance of Ukrainian refugee reception. According to UNHCR, 90% of those who have fled Ukraine are women and children, with fighting-age Ukrainian men required to remain in the country (UNHCR, 2022). This makes it not only reasonable for politicians to highlight the gendered dimension of refugee reception in this case, but it also is a situation that ties quite naturally into Swedish norms that put an emphasis on identifying the particular vulnerabilities and needs of women and children in crisis situations, thus ensuring that these are prioritized and not forgotten. The Left Party is especially pointed in highlighting how gender figures decisively as a rationale for Ukrainian refugee reception, with Left Party member of parliament, Hanna Gunnarsson, declaring that:

It is always women and children that suffers the most in war. Sweden must accept refugees from Ukraine. (Riksdagen, 2022a)

Similarly, framing the issue as one not just of refugees, but specifically refugees as women and children, Emma Hult, a Green Party parliamentarian, characterized the dire consequences of the war in Ukraine as one where:

Women and children are fleeing their homes [...] and we must now do all in our power to offer them a safe place to be. (Riksdagen, 2022b)

The broad political support for refugee reception and the factors that are highlighted as making Ukrainian refugee reception essential all serve to illustrate the disadvantage that unaccompanied refugee youth from Afghanistan who are in Sweden under the High School Laws experience. In rather blunt terms: unaccompanied refugee youth in Sweden are associated with a crisis that has, by and large, fled from the public eye, whereas the war in Ukraine effectively dominated the public consciousness.

Unaccompanied refugee youth in Sweden are associated with a conflict on a distant part of the globe, while the war in Ukraine is seen as happening effectively in Sweden's backyard. For those who opposed refugee reception during the events of 2015 and after, unaccompanied refugee youth in Sweden are seen as culturally distant, whereas Ukrainian refugees are portrayed as having much in common culturally with Sweden. Lastly, unaccompanied refugee youth in Sweden are largely male, which disadvantages them in a normative climate where the genuine vulnerability of women in war and conflict is seen as the more pressing priority.

## DISCUSSION AND CONCLUSION

By drawing on impressionistic approaches to interpretive policy analysis and, as informed by the ideational turn in institutionalism and governance research, this chapter highlights the complex and contingent processes that affect how vulnerable individuals are viewed by policymakers and society. Shaped by underlying values and broader events, those processes determine individuals' worthiness as candidates for persistent public attention and policy solutions that speak to their needs.

The Swedish Covid-19 pandemic response consisted of fewer restrictions on both business and people relative to many other countries. Nonetheless, as an open, export-dependent economy, Sweden experienced a decline in economic activity, resulting in layoffs and broad hiring freezes. In response, the Swedish parliament adopted several emergency policies to mitigate the consequences for both businesses and employees. These measures were implemented within a broader public health context that emphasized the need to ensure that measures to address the pandemic would take into account the needs of young people in particular.

For the group of unaccompanied refugee minors who came to Sweden in 2015 and were subject to the provisions of the High School Law, deteriorating labor market conditions reduced their chances of being able to find employment within six months of graduation in order to avoid losing their status and being deported. Supporters pointed this out and suggested a reform to provide a more generous time frame for securing employment. Yet, such proposals were rejected. This chapter highlights how arguments regarding preferential treatment, claims about the need to avoid "ad hoc" approaches to policy reform, and a gendered understanding of deservedness all figured prominently in the successful strategy to block policy reform.

Our own positionality within this policy (non-)reform process should be acknowledged, not necessarily for purposes of full disclosure, but in relation to our overall assessment of reform prospects going forward. We are both, in different ways, active in issues of refugee reception in Sweden. We were greatly heartened by some claims by Swedish politicians, such as former Prime Minister Reinfeldt who stated in 2014 that Sweden needed to open its heart to refugees from Syria, but were equally disheartened by the decision of the Social Democrats to join the European race to the bottom in adopting restrictive refugee admission policies in late 2015. Even in 2022, at the time of writing, we find ourselves active in assisting Ukrainians in Sweden who have received temporary protection, as well as those who remain in Ukraine by choice or who lack options to flee.

Policymakers and the public have limited capacity to keep multiple pressing situations high on the agenda or front and center in their thoughts. Sadly, new humanitarian catastrophes force previous ones out of the policy spotlight. For the case of unaccompanied refugee youth who now remain temporarily in Sweden because of the non-reformed High School Law, the chances that they will wind up back in the policy spotlight are small. They have, as this chapter shows, too much going against them: be it values, be it proximity, be it notions of deservedness, or be it just the passing of time. But most likely: all of these at once.

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# The Tricky Thing of Implementing Migration Policies: Insights from Return Policies in Sweden

*Henrik Malm Lindberg* 

## INTRODUCTION

Migration policy is a field characterised by huge implementation problems and there is a vast literature on the Gap hypothesis, referring to the systematic divergence in policy. In other words, there is a gap between what governments aim to do and what they actually achieve. In general, implementation failures may have many causes and, putting it briefly, implementation of policy can be more successful if the implementing organisation has enough capacity for its task, knows what it should do, for example, clear and explicit decisions, and it genuinely wants to complete the task.

This field of policy and decision implementation addressed here is something traditionally approached by public administration researchers. It encompasses different traditions, approaches (top-down, bottom-up), theories and schools of thought. In broad terms, implementation research

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is about why intentions and decisions among governing bodies are not always put into practice and do not always achieve the intended goal (Sannerstedt, 2001, p. 28).

Implementing policy when the targeted or affected individuals are less than willing to adapt and submit to the legislation adds one further dimension to the challenges. This leads us to the fundamentals of return policies in Sweden. In essence, an asylum seeker's primary goal is to stay in the host country and, ultimately, be granted a permanent residence permit. However, according to the statutes and rules set up in legislation and custom, some seekers are not entitled to either asylum or other grounds for staying in Sweden. Thus, their applications are rejected, and after a legally binding (non-appealable) decision, they are deported from Sweden. It is expected that the rejected asylum seekers are available and cooperative in relation to the migration authorities. However, if they do not return voluntarily, there is the threat of being forcibly denied entry or deported from the country by the police. Not every mean can be used to enforce the policy. Beyond being efficient, the Swedish policymakers and the agencies in charge also clearly state that humanity and legality are two other goals or, perhaps, values to be upheld. Despite efforts by different actors in Sweden, only a minority submit and return voluntarily: roughly 44 percent of all return cases result in voluntary return (Malm Lindberg, 2020).

Thus, states in general—not just Sweden—are facing an uphill task, using several measures attempting to track, identify, and, ultimately, remove rejected asylum seekers and other irregular migrants from its territory. In that struggle, the states have attempted to implement different measures for control, monitoring, and identification as well as economic incentives and different kind of information, but the ultimate threat is to use coercive measures and forcibly remove the irregular migrants (Noll, 1999; Broeders & Engbersen, 2007; Scalettaris & Gubert, 2018, p. 2). Return or deportation policies are often considered a secondary instrument of immigration control, where liberal democratic states increasingly make an effort to make 'unwanted' migrants leave their territories through return policy instruments aiming either for forced or voluntary return (e.g. Bucken-Knapp & Zelano, 2023, this volume). Thereby, it complements measures designed to control the entry of immigrants, including visa procedures, border patrols and identity checks at ports of entry (Ellermann, 2005). This 'deportation turn' is part of a broader tendency among states to make it harder to immigrate and to control migration (de Haas et al., 2016).

In this chapter, I contribute to the discussion of the so-called Gap hypothesis on the disparity between policy on paper and its implementation through the bureaucracy. Furthermore, grounded in a basic framework for implementation established by Lundquist (1987), I also examine the role of street-level bureaucracy in the implementation of return policy in Sweden and, albeit briefly, touch upon how the Covid-19 pandemic may impact implementation.

### *Method and Data*

The empirical foundation—and the voices of the informants—is based on semi-structured interviews with roughly 40 bureaucrats from different levels, ranging from top- and mid-level to, primarily, front-line or street-level bureaucrats, for instance persons in the field. The bureaucrats are employed by Migrationsverket (the Swedish Migration Agency), Polismyndigheten (the Police), and Justitiedepartementet (the Ministry of Justice), as well as other public agencies and select civil society organisations. Data collection took place in the pre-pandemic years 2018–2019 within the Return and Reintegration project at Delegationen för migrationsstudier (Delmi—the Migration Studies Delegation). The interviews, which lasted for 40–120 minutes, were recorded and subsequently transcribed. The lion’s share of the interviews was conducted individually and face-to-face. They were semi-structured with questions on topics known by the informants, but there was also room for additional questions. Some respondents were mainly asked specific questions about ‘hard facts’ on, for example, the return policy or enforcement procedures in different situations. Other respondents were mainly asked about their judgements and assessments of different issues and what they struggled with in their work; thereby these individuals often gave anecdotes and examples. These interviews were manually coded, based on keywords, and then classified into different themes based on the implementation challenges that exist. When possible, a triangulation of data from diverse interview sources was made, including the substantiation of claims using written resources (Malm Lindberg, 2020).

## EARLIER RESEARCH AND THEORY

*Implementation and Street-Level Bureaucracy*

Which factors are traditionally associated with success or failure in implementing policy in general? In the aftermath of the early implementation studies in the 1970s, ‘checklists’ with some prerequisites that should be met in order to achieve success were often drawn up (Löfgren, 2012). These include Hogwood and Gunn (1984), who gave a long list of recommendations for successful implementation: to have no insurmountable external constraints that affect the implementer’s job; to allocate adequate time and sufficient resources; to have the required combination of resources at the right time; to base the political decisions on an accurate causal understanding of goals and means; that dependency relationships are minimal; to specify the correct sequence of tasks; to ensure perfect compliance and communication between those involved; etc. It is safe to say that all these prerequisites will probably never be present simultaneously; hence perfect implementation almost never happens. However, such checklists can still have a clarifying function when there are decent chances of accomplishing the goal.

Van Meter and Van Horn (1975) use organisational theory to show the complex and dynamic relationships that exist between many different, mutually independent, variables. They point out that implementation is successful when the organisation has sufficient capacity, knows what it should do, has clear and explicit decisions, and wants to complete the task. Roughly the same aspects are also elegantly expressed by Lundquist (1987, pp. 76–78) and the concepts used later.

- Does the implementer *understand* what is to be implemented?
- Does the implementer have the *ability* to implement?
- Does the implementer have the *will* to implement?

I assume here that the affected authorities and their staff can be characterised as street-level bureaucracies. This expression, coined by Michael Lipsky (1980), basically means that employees in lower-level posts (grass-roots level), who have direct contact with the clients, find themselves in a position between clients and authority. They are essentially responsible for translating governmental policies into concrete action. By interpreting regulations and political decisions, they can thereby take over much of the

implementation of the decisions that are made. In close interaction with clients, whether pupils, patients, asylum seekers or irregular migrants, the front-line bureaucrats establish their own routines and working methods to manage their jobs. They can choose to invest more formal and informal resources in their clients and provide them with access to more or fewer resources. It is essential that street-level bureaucrats, at least to some degree, have the possibilities to formulate (their own) interpretations of how the assignment should be carried out, thereby sometimes bending and sometimes also breaking the formal rules (Portillo, 2012; Baviskar & Winter, 2017; Lavee, 2021). Having this bottom-up approach and connecting to the street-level bureaucracy literature, in line with Lipsky (1980), leads in the direction of a deeper investigation of the organisational context of implementation.

This group of front-line bureaucrats must manage resource shortages and difficult prioritisations, which often causes their actions to be questioned (Lipsky, 1980; Löfgren, 2012, p. 9). Earlier Swedish research characterises both Polismyndigheten (Hydén & Lundberg, 2004; Hansson, 2017) and Migrationsverket (Rosén, 2010) as street-level bureaucracies, with the characteristics that such agencies and front-line bureaucrats have. When the term came up in some of the interviews the respondents often felt familiar with it. I choose to proceed based on Lundquist's (1987) three conditions (understanding, ability, willingness) for how the bureaucracy can successfully implement policy or decisions.

### *The Gap Hypothesis and Implementation Problems in Migration and Return Policies*

Migration policy is often deemed an area characterised by huge implementation problems. Failing to meet migration policy goals is more of a rule than an exception, true across time and space. The literature on the gap hypothesis, formulated early on by Cornelius et al. (1994), points to the gap between what governments aim to do and what they actually achieve. The list of political failures is long and examples can be drawn from numerous Western countries. Thus, the interesting question is not if there are discrepancies between goals and outcomes, but rather how this phenomenon can be measured, understood and explained (Cornelius & Tsuda, 2004, p. 4).

Despite a large literature referring to the gap hypothesis, the concept remains surprisingly vague, referring to different types of gaps within the



policy process (Lahav & Guiraudon, 2006; Boswell, 2007; Czaika & de Haas, 2013). There are several reasons for the difficulties associated with migration policy (see also Jerneck, 2023; Lerpold et al., 2023; Bucken-Knapp & Zelano, 2023, all this volume) and the fact that goals are rarely achieved. In addition to the factors associated with the migration process itself, globalisation and the disparity between the affluent North and the impoverished South give rise to more or less unwanted migration flows (see Massey, 2023, this volume). Castles (2004) points out that several domestic factors in the receiving country can also affect the outcome. These include conflicts of interest between different groups, the political desire to control migration, the actions of civil society, and, finally, the significance of the migrants' rights that are recognised by liberal democracies (Hollifield, 2008). The failure to meet migration policy goals may also have something to do with the fact that the means used can lead to goal attainment in theory, but in practice have diametrically different consequences. One example is stricter border controls that, in many cases, do not lead to lower immigration but instead increase the significance of human smugglers and, furthermore, lead to irregular migrants staying in the country when the possibility of return is limited (Cornelius & Tsuda, 2004).

The argument over the lack of effectiveness in migration policy is mostly because international migration can be seen as mainly driven by structural factors, like labour market imbalances, inequalities in wealth and political conflicts in origin countries; all factors on which migration policies have little or no influence. Rather than affecting overall volumes of inflows, immigration restrictions primarily change the ways in which people migrate, such as through an increased use of family migration or irregular means of entry (Czaika & de Haas, 2013). Moreover, there is also a considerable gap between tough immigration discourses by politicians and actual migration policies, which are generally much more nuanced and varied. Tough rhetoric may give the misguided impression that immigration policies have become more restrictive.

Thus, there is a need to further dissect policy practices by acknowledging the considerable gap between policies on paper and their practical interpretation and implementation. The extent to which written policies are implemented varies widely and depends on factors ranging from financial and human resources, the weighing of different and potentially competing policy priorities, to the discretion of civil servants and other state agents (Czaika & de Haas, 2013).

There are four distinct levels in migration public policy: discourses, actual migration policies on paper, policy implementation and the actual migration, the latter being the policy outcome. This fourfold distinction allows for the identification of three ‘immigration policy gaps’: (a) the *discursive gap*, or the discrepancy between public discourses and policies on paper; (b) the *implementation gap*, or the disparity between policies on paper and their implementation; and (c) the *efficacy gap*, or the extent to which implemented policies can affect migration. The discursive gap, between discourse and practice, is common in public policy, not necessarily related to a policy failure, and it will not be covered here. The efficacy gap is also not addressed here, for that matter.

The implementation gap, which is covered here, relates to the fact that some rules and regulations are not—or only partially—implemented because of practical, planning or budgetary constraints. The non-implementation could also be a consequence of corruption, ignorance or subversion. Politicians, civil servants and private companies (e.g. airlines implementing carrier sanctions, asylum case workers, border agents, public institutions or private institutions processing work visa requests) often have considerable discretion and agency in the way they implement policy on the ground (Ellermann, 2006; Wunderlich, 2010).

This implementation gap seems to be particularly significant if there is a large degree of discretion and assessment involved in policy implementation. This leaves considerable scope for subjective interpretation and political or public pressure, for instance in refugee status determination and work permit applications (cf. Ellermann, 2006). Having discretion increases the willingness to implement policy in general. Empirical studies also confirm this, linking discretion via client meaningfulness to a larger willingness to implement policy. The positive effect that discretion has on the bureaucrat’s perception of client meaningfulness can be seen as a condition for the second effect: more willingness to implement the policy. When street-level bureaucrats perceive that their work is meaningful for their clients, this strongly influences their willingness to implement it (Meyers & Vorsanger, 2003; Tummers & Bekkers, 2014).

Thus far, I have discussed implementation of migration policy in general. If we move closer to the enforcement of rejected asylum applications (also called deportation, removal or expulsion), several normative, empirical and theoretical issues surface. To restore and retain the integrity of the immigration system, deportations are necessary. Sometimes

deportation policy targets what can be called less attractive groups, such as ‘bogus’ asylum seekers, illegal immigrants and criminal foreigners (Arnold, 1990).

However, the actual implementation of a deportation policy affects other individuals as well, including families with children or socially and economically integrated immigrants. When confronted with these cases, public opinion tends to change and point in another direction. The need to use coercion is not an easy thing to handle for liberal democracies and there is always the risk or possibility that there is grass-root mobilisation against some deportation cases from civil society actors (Ellermann, 2005, 2006). This mobilisation, regardless if we agree or not, is a substantial threat to the bureaucratic capacity in this field.

Understanding the extent to which states have the capacity to implement the enforcement of rejected asylum applications within the existing institutional structures is interesting. One issue is the complexity, meaning that enforcement capacities require an effective bureaucracy and interpersonal relations that enable the collaboration between the different state and non-state organisations—operating at the international, national and local levels—involved in return (Leerkes & Van Houte, 2020). To a large extent, governments are developing policy to apprehend and deport unauthorised migrants. The legal and administrative framework of Western Europe generally allows for strict interior policing of unauthorised migrants (Leerkes et al., 2012).

### IMPLEMENTATION OF RETURN POLICIES: THE CASE OF SWEDEN

Sweden can, in political and administrative terms, broadly be characterised as a non-corrupt, liberal democracy with a centralised state that generally has high capacity in implementing policies in different fields. This well-functioning bureaucracy has long roots in Sweden and was already present in the pre-democratic epoch. This feature is often seen as a precondition for efficient policy making.

When it comes to enforcement of rejected asylum seekers, both main implementing agencies—Migrationsverket and Polismyndigheten—are independent and have an autonomous role in relation to the government. The present system with two agencies in charge, where Migrationsverket

handles the ‘voluntary return’ and Polismyndigheten all remaining cases, developed in the late 1990s.

In numbers, the return cases increased significantly in Sweden between 1999–2018. From about 5000 cases per year around the turn of the century to 20,000–25,000 cases in the 2010s. This increase is partly behind why the issue of return was put high on the agenda around 2010, becoming a priority for letters of appropriation. Despite having a reputation and a tradition of being generous in terms of asylum and refugee reception, migration policy was overhauled in a severely restrictive direction and the border controls were increased in the aftermath of the large refugee influx in 2014–2015.

### *The Understanding*

The question of understanding *how* to implement a decision is about understanding the real meaning of the phenomenon. In implementation literature, this depends on, among other things, decisions, goals and guidelines being communicated to relevant enforcing authorities and other bodies, as well as that there is no stark discrepancy between what is said centrally and what is carried out in the field. Previous studies of enforcement work in Sweden indicate that there is evidence of communication deficiencies, partly explained by the phenomenon of ‘the whispering game’. It essentially means that communication across each link of the policy chain with an agency and the exercise of authority is distorted or misunderstood—either downwards or upwards (Borrelli, 2018).

One example, from Borrelli’s research on how street-level bureaucrats handle their tasks regarding enforcement of return decisions, is from Gränspolisén (the Swedish Border Police), where officers note, with great deal of irony, that their prime minister publicly announced an increase in deportations to 80,000 per year, without taking into account its feasibility. The street-level bureaucrats felt excluded from decision making, thus affecting their acceptance of the policies. Potentially this can strengthen distortion and wilful dismissal as well as ignorance of the information communicated. Decisions that are passed down are often not understood since they come from a detached group of superiors, without any practical knowledge or street-level experience (Borrelli, 2018, p. 810).

Communication deficiencies are one of the more common obstacles noted in the implementation literature; its presence is regularly highlighted when listening to the experiences of the informants. Several

representatives for the agencies provided examples of when information, fully or partially, stays within an agency, unit or division when it ought to have been communicated onwards: the more links in the chain, the greater the risk of transfer losses. A top-level senior officer at Migrationsverket, Sverker Spaak, points out that his agency, through its return liaison officers, usually has good knowledge of what is happening in individual countries, like Afghanistan (Spaak, 2019). However, this knowledge at the higher echelons rarely reaches front-line bureaucrats who directly communicate with individual asylum seekers.

Similarly, there are several examples of where the agencies are not allowed to communicate freely because information must not be disclosed due to privacy or confidentiality rules:

[t]he privacy rules need to be reviewed so that information can be shared about the returns between the different agencies and actors [in a way] that the procedures can be further improved [...] For example, in the REVA project, where there were many experiences that may not have been followed up and implemented properly. (Eva Qvarnström, Nationella Transportenheten [NTE—Prison and Probation Service’s Transport Service] 2018; REVA stands for Legal Certainty and Effective Enforcement, a project carried out by the Swedish Police together with other agencies in order to boost the effectiveness of enforcement of deportations)

From the informant statements, it is also evident that there are many potentially conflicting objectives for return policies that front-line and mid-level bureaucrats face, both in the enforcement process itself and in relation to other migration policy goals. One such conflict is between the goal of effectiveness and the other two often-mentioned goals of humanity and legality. In the daily work of the front-line bureaucrats, certain situations create the need to determine how to weigh the different goals against each other. What sort of means should be used in the field in order to successfully enforce a decision, without breaking any law or practice intended to protect values such as humanity and legality? Methods and approaches are tested time and again, as recounted by many informants at both Migrationsverket and Polismyndigheten. Another source of tension exists between the agencies’ right to use coercive measures to enforce decisions versus the right for individuals to not be subjected to restrictions of their freedoms (Malm Lindberg, 2020).

The front-line bureaucrats might also suffer from conflicting messages arising from different policy goals, namely integration versus return. How

to make priorities when the focus is shifting? One informant at the municipality level states that:

[r]eturning has not been an alternative that has been talked about at all. When we started with this, both children and adults were saying, “what, we’re not going home, are we?” There was like no ... you work, work and work for integration but you haven’t even looked at reintegration in the home country ... but in fact, a rather large percentage of both children and adults have their applications denied. And our society has not been prepared to deal with this at all. (Elisabeth Lindholm, Strömsund municipality, 2019)

There are other kinds of conflicting objectives as well. In the present system there are several obstacles to enforcement that are often mentioned by the street-level bureaucrats—especially at Migrationsverket and Polismyndigheten—that conflict with their daily work with the cases. It is possible to identify three different themes, which are also extensively elucidated by our informants, that influence implementation efforts: the possibilities to apply for a change of track, the possibilities to argue impediments to enforcement (*verkställighetshinder*, VUT) and the possibility to get a regularisation decision.

The first illustration of potentially conflicting objectives can be taken from the possibility to switch tracks in the asylum system. The possibility of obtaining a labour market work permit after a rejected asylum application has come to be called a change of track and one consequence of the opportunity to change track is that it puts a strain on the system. A senior officer at Migrationsverket points out that there is also a risk of confusing operations by making the boundary between being asylum seekers and job seekers more diffuse. By applying for asylum, one gets the opportunity to work and, thereby, a chance to stay in the country despite not having grounds for asylum. The broadened opportunities for a change of track mean that a ‘no’ in the asylum process does not have to be a ‘no’ to stay in the country, which then means that those who have been denied asylum have no incentive to prepare for return (anonymous interviewee, Migrationsverket). A similar argument is presented by another senior officer at Justitiedepartementet:

[c]oming here and applying for asylum can just be a way to legalise your stay and be here for a short time and do something else. This can be working or ... our inability to handle these asylum applications very quickly makes it

tempting to come to Sweden because you can legally be here for a long time. (Mikaela Eriksson, Justitiedepartementet, 2019)

The opportunity to claim and have an impediment to enforcement (VUT) assessed occurs after a refusal-of-entry or expulsion decision has gained legal force. It refers to new circumstances that have not been assessed before in the asylum process. The question of how to deal with impediments to enforcement is important to many of the informants at the agencies that were interviewed. One informant, a regional process manager at the Gränspolis (2019) also emphasised the problems—with an ironic touch—associated with an already legally binding case being taken up again:

[i]t's great that there are so many instances and that it will be examined and so on, but you can be, like, applying for impediments endlessly. (Malin Köhler, Polismyndigheten, 2019)

At Migrationsverket, a team leader, also points out that the asylum seeker has no incentive to prepare for a return and that, thereby, the process becomes less predictable and thus, from her perspective, less legally certain:

then I actually don't think that we are meeting the legal requirements of both the Return Directive and the Aliens Act. This whole thing that a process must be able to be predictable [...] That's even difficult for ourselves [to know]. "Wait, a closed enforcement case, but it's up as a secondary school case. Is she enforceable, or is she not?" How is the applicant supposed to understand all of this herself then? (Jessie Ahrdenberg, Migrationsverket, 2019)

Her latter statement points to the fact that her job being a front-line bureaucrat is severely constricted by legislation—including new laws like the High School Law as described by Bucken-Knapp and Zelano (2023)—that gives extra possibilities for rejected asylum seekers to reapply and start the process anew.

In summary, bureaucrats on all levels face conflicting objectives for the return policies, whether in relation to the enforcement in itself or in relation to other migration policy goals affecting implementation. The different objectives also seem to send out a signal through the system, not only

to bureaucrats but also to the rejected asylum seekers and their supporters that a no in the asylum decision is not always a no to stay. Consistency in the system is often claimed to be a necessary condition for successful implementation, but terms such as ‘consistent’ are not used by our informants when they speak about the present system.

### *The Ability*

When policies are to be implemented in a certain field, the ability to do so must be present. To have the ability to implement, an effective division of responsibilities and duties between the actors involved is required. Assets like knowledge, competence and capacity must be at the public administration’s disposal, at the right time and at the right place. The most important relationship within the implementation chain is between Migrationsverket and Polismyndigheten. Here there is an interface, a sort of shared boundary, where cases pass mainly in one direction and where information is lost, partly because of the differences in the case management systems.

These differences also mean that statistics are quite difficult to interpret and draw conclusive implications from, even by professionals. This was highlighted in the final report of the REVA project, something we will return to, which points to the large improvement potential that lays in creating common metrics and statistics across agency boundaries (Migrationsverket, 2014, p. 52). This feature is noted by the Ministry of Justice, but with little success.

We stand here and stamp our feet a bit and we are a little frustrated ourselves because we don’t come any further, our ministers expect the statistics they get to be complete, but we always have to add that there are deficiencies in the statistics from the police, year after year [...]. We don’t really see that we have moved forward. (Mikaela Eriksson, Justitiedepartementet, 2019)

When it comes to ability in the sense of working methods and routines, Lipsky’s (1980) theory of front bureaucrats emphasises that not all of them act the same. Rules are interpreted a little differently in the field and are stretched from time to time—which is broadly expressed by the informants. This results in a lack of uniformity, but it also points to the discretion that, in turn, is needed in the profession. Since both agencies have the nature of front-line bureaucracies, this is a result we should expect. This



applies especially to Polismyndigheten, which before 2015 was divided into different agencies at a regional level, a factor that still seems to have an impact.

If capacity is about having the necessary physical resources at hand, competence is about having the skills or know-how to complete the tasks. At both agencies, core competencies are either lacking or sometimes outright missing. Polismyndigheten often uses the term border police competency, which refers both to knowledge of laws concerning aliens as well as to methods and approaches that are used during so-called in-country checks. Several informants emphasise that there are far too few police officers who have this special competency and that the education at the police training academies is not enough to complete the tasks.

Moreover, not only are the training initiatives too small, but additionally the level of ambition in the courses has also decreased. Officers who work on the streets are given only basic training that, “allows police officers to ask questions during, for example, in-country checks, but not always to interpret the answers” (RPS, 2014, p. 6). Thus, in order to be able to carry out their tasks, police officers must build their own networks of support outside their own circles. Besides the lack of training, there is also the issue of experience. Outside of the three metropolitan districts, the various non-metropolitan police districts have so few cases that the competency and know-how level of the staff is not easily maintained. The result is that individual police officers refrain from completing (justified) checks of aliens because they are inexperienced and afraid to make mistakes (RPS, 2006, p. 4; Ann-Marie Orlor, Polismyndigheten, 2019; Göran Millbert, Justitiedepartementet, 2019).

However, the complexity that this work entails already requires greater competence among the personnel, including those at the Migrationsverket. Not least, in order to feel confident in their roles and develop as decision-makers,

[y]ou have to see that this job, the complexity we have talked a lot about, but we have to admit that it is difficult and requires training. Time is needed to reflect and take in what you have learned, new practices, and to discuss. (Niclas Axelsson, Migrationsverket, 2019)

Without this knowledge and skills, the ability to perform operations, such as in-country checks, is limited. Competency deficiencies can also be an important reason why Migrationsverket has difficulty solving the

problem of uniform and reliable statistics. This makes it very difficult to accurately categorise and measure return, which then makes it difficult to evaluate the return policy.

The lack of resources to handle enforcement decisions can, according to the informants, be attributed to a combination of factors. One aspect worth mentioning is the distribution of resources over time:

[w]hen ... a lot of people are coming in during a short period of time, the process can be shaken because it is difficult to allocate resources correctly. (Milot Dragusha, Justitiedepartementet, 2019)

This, in turn, stems from the large and often unexpected fluctuations of cases. The picture drawn by several of the informants is that enforcement operations are difficult to plan, thus affecting the sustainability of their work.

Long-term planning and coordination are also affected by the control that different units inside return operations and enforcement have over resource allocation. Those in charge of return operations do not control the flow of resources for the activities linked to return. To channel more resources, it is essential to convince, for example, regional managers at Migrationsverket around Sweden to allocate these (Malm Lindberg, 2020).

In conclusion, the relationship between the two implementing agencies is of utmost importance since there is an interface where cases pass from the Migrationsverket to Polismyndigheten and sometimes back again. Information is often lost due to differences in the case management systems or rules on sharing information as well as the inherent fact that there are two types of agencies involved. However, the ability challenge also touches upon the ways that resources are handled. Thus, personnel, premises and equipment are not the real issue, rather it is the competence.

### *The Willingness*

One feature that research investigates in connection to the work efforts and motivation of street-level bureaucrats is their willingness to implement policy. Although this willingness, or alternatively resistance, inside the bureaucracy to implement public policies is the third and last of our categories, it is not the least important.

Tummers et al. (2012) construct a framework, based on empirical findings, for analysing the willingness to implement policies and examines

three factors that influence it: (a) *the policy content and discretion*; (b) *the organisational context*; and (c) *the personality characteristics* of the public professionals. The first factor (a) primarily relates to the discretion available during the implementation and the perceived meaningfulness of a policy. The second factor (b) relates to the influence of professionals, the subjective norms of managers and the subjective norms of colleagues towards the policy. The last factor (c) relates to the rebelliousness or rule compliance amongst implementors. While it is not possible to systematically investigate these factors in the interviews that were performed, it is still a good framework to proceed from.

An issue we touch upon is the resistance to implementation among street-level bureaucrats. We know from previous research that personnel at Migrationsverket can have a certain degree of resistance to implementation if the decisions from the agency do not align with what the street-level bureaucrats feel is right (Qvist, 2008). The motivation of those who implement the decisions can also be influenced by aspects like the nature of the case. There are signs, among informants at both of the two most important agencies, that resistance to a specific part of the job in this group changes the time spent and efforts made. Within the enforcement of return cases, some of the hardest cases seem to be those involving children. Some questionnaire responses from the staff in Jönköping County to one of Rikspolisstyrelsens (RPS—National Police Board) (RPS, 2007a, pp. 22–23) earlier investigations illustrate this fact:

[f]or one thing, it's really hard on the staff to have to frequently enforce decisions on families with children, especially when the children are used as 'weapons' to get to stay in the country [...]. Eventually, the strong pressure, from the public, municipal authorities, church organisations, and even from the press, does a lot to make our work more difficult.

In this case, it seems to be the organisational context regarding the role of professionals and managers inside the organisation, but also actors outside of it, that de-motivates them.

In order to implement policy, those who perform the actual enforcement actions, both organisations and individuals, must be fully motivated to carry out their tasks. Research in this field, including on Swedish conditions (Hansson, 2017), points out that the enforcement work is emotionally charged and difficult to manage, not least for the front-line bureaucrats who, in the worst case, suffer a deterioration of their psychological

well-being. Here, it seems to be the policy content in itself that is hard to motivate from. Another aspect that seems to influence willingness is whether (return) activities are noticed and to what extent these are prioritised within the organisation or the agency in question.

Talking about prioritisations: all organisations with different functions divided into departments or units tend to, sooner or later, develop internal hierarchies where some parts are superior to others. This superior–inferior order expresses itself in dimensions like status differences, where the units receive different levels of attention from the management. So how does it look like in the area of return within, primarily, Migrationsverket and Polismyndigheten? Both internal and external investigations and reports, as well as informants’ statements, paint a picture that return work is not prioritised. The RPS’s (2007a) extensive investigation into more effective and legally certain enforcement mentions right in the second paragraph that these operations, “live a somewhat obscure and vulnerable existence at many police agencies”, and it emerged that enforcement of return decisions “is considered by many police officers as an odd business” (RPS, 2007b, p. 1).

The informants who were interviewed testified that the status of return and enforcement issues is not exactly a top priority at either Polismyndigheten or Migrationsverket. To a direct question posed to some team leaders in three Migrationsverket regions, the response was that return activities were not prioritised. It is considered that,

[t]he agency talks about the importance of return, but the experience is that this is not reflected in the conditions given to carry out qualitative and effective return work. (Anonymous at Migrationsverket 2019)

Sverker Spaak expresses that it is very rare that anyone at agency management level talks to the press about return issues. In the organisation’s internal hierarchy, these issues, along with detention centres, are at the bottom of the list, which also manifests in staff flows, attention and influence over the agency’s management. During the time as process manager, the senior officer worked closely with Polismyndigheten, often collaborating with them. However, this was met with some internal resistance at the agency. It was seen as a risk that the agency was ‘too exposed’ in these matters—and if this had to be the case, it should preferably not be together with Polismyndigheten.

A desk officer from Gränspolisén asserts that, “border policing has been an odd bird [and] a bit of a satellite in policing operations, where there has been focus on so much else” (Åsa Petersson, 2019). This phenomenon, being somewhat outside the core of the policing duties, is also vividly described by the head of Gränspolisén:

it’s about the border police and policing activities in general going through a sort of paradigm shift, where the border police have long been considered—and consider themselves—to be the extended torpedo arm/muscle of the Migration Agency. The Migration Agency with force. So now we’re very actively trying to bring border policing operations much closer to the Police’s core mission. (Patrik Engström, Gränspolisén, 2019)

The above statements do not really answer the question of why return activities appear to be given lower status and lower priority in the work of both Migrationsverket and Polismyndigheten. Thus, one reason for the low priority could lie in the fact that employees more often want to deal with issues other than return and detention. Naturally, the causal relationship can also be the reverse: that the staff notices and feels that return is not really a priority inside the organisation and, thus, they seek other areas of activity within both agencies and that those who are interested in these issues are deterred by its low status.

As Ellermann (2005, p. 1234) mentions, political support from the government is vital, in her case from different regions in Germany. Our case also shows the fundamental importance of having the politicians’ support. The aforementioned REVA project (2009–2014) did not, in and of itself, give Polismyndigheten greater authority in doing in-country checks, but was merely a process overview of enforcement work. The ambition was that in-country-checks were supposed to be an integral part of regular police work or police operations (Malm Lindberg, 2020). What happened in 2012 and 2013 is that it received media attention and triggered a debate. Criticism came from many actors, including politicians and the Polisförbundet (the Police Union) Chairperson, among others. Several informants from Polismyndigheten also confirm that the criticism affected their actions:

[t]here are several reasons behind the reduction of in-country checks. Partly, I would say that the so-called REVA debate was absolutely a reason that many policemen no longer dared. (Patrik Engström, Gränspolisén, 2019)

Another informant emphasised that this debate, portraying police enforcement as inhumane acts of state coercion, in his mind, had even deterred candidates at Polishögskolan (PHS—Police Academy) from completing internships in units conducting enforcement work (Jerk Wiberg, Gränspolisén, 2019).

To summarise, it is evident that those who execute the enforcement work, both organisations and personnel, must be motivated to carry out also unpleasant tasks that are emotionally challenging. Another aspect that seems to influence willingness is whether return and enforcement activities are prioritised within the organisation. The ‘odd bird’ metaphor points to the fact that such issues might be prioritised in rhetoric at the top-level, but it seldom trickles down to the lower levels. It is also clear that agencies are not immune to opinions from the outside and, in the case of return and enforcement, a partial explanation for its low status may be the sentiments it arouses.

### *Effects of the Covid-19 Pandemic*

As mentioned earlier, the interviews that formed the empirical foundation for this chapter took place in a pre-pandemic era. But in early 2020 the outbreak of the Covid-19 curbed the ability to implement rejected asylum seekers and other irregular migrants. The main reason seems to have been from both legal and physical reasons, such as the travel restrictions in place and the lack of available flights. Here we note that the policies of the countries of origin played an important role, but also restrictions in Sweden such as reduced detention capacity to meet sanitary measures (EMN, 2021). More generally, and not only related to return policies, it also seems that the current toolbox of international migration governance has few or ill-adapted instruments for dealing with the impacts of a pandemic of the nature and reach of Covid-19 (Newland, 2020, p. 2).

The implementation literature has dealt with the challenges posed by crises like the Covid-19 pandemic. Such crises are characterised by unexpected and continuously changing circumstances. Government responses to such events depend even more than normally on a constant bidirectional information flow between decision-makers and implementers at the front line. The downward flow of comprehensive and clear information is necessary, but also the upwards information flow providing feedback about how formal policy decisions are met and affect the street-level (Gofen et al., 2021, pp. 484–485).

Albeit more speculative, with regards to the Covid-19 pandemic it is possible that the challenges imposed by a turbulent environment give an unusually long ‘window of opportunity’ to change policy design—if policymakers can adapt. The lack of regularity and previous experience disrupts the status quo and surely provides challenges in the short run, but possibly also opportunities in the long run.

## CONCLUSIONS

This chapter starts with a reference to the Gap hypothesis, first and foremost the implementation gap of policies. Essentially it means that some rules and regulations are not, or rather only partly, implemented because of different kinds of constraints. The bureaucratic capacity is limited, and this is mainly because the prerequisites for a successful implementation are seldom available. The Covid-19 pandemics can be considered a crisis when circumstances change unexpectedly and continuously which gives, at least in the short run, even larger challenges.

We should keep the following in mind: To succeed in their intent, implementers inside the migration bureaucracy must understand how to implement policy, while also having the ability and the willingness to do so. Further, they should also have a favourable environment to work in. As noted earlier, the irregular migrants or rejected asylum seekers belong to the group that is supposed to return ‘voluntarily’; certainly, these individuals (and families) have a different goal to that of the personnel designated to enforce these decisions. It is a fundamental logic of the system that is worth repeating.

Another fundamental aspect has to do with the constitutional liberal democratic state that gives the right to individual assessments and humanitarian considerations; these constitute a certain inherent restriction on enforcement and return tasks. Yet another aspect is the fact that working with return and enforcement is not a priority at either agency and not really in line with their core tasks or mission. That return work is sometimes seen as ‘low status’ at these agencies can also be a factor that explains why both Migrationsverket and Polismyndigheten have a hard time meeting the need for competence.

Moreover, charged with the mandate of implementation, the front-line bureaucrats, along with those at the upper level in this study, consider public attitudes on enforcement to be, more or less, biased against

deportations. The phenomenon is easy to criticise and almost no matter how bureaucrats act, there is a risk of ending up sitting on the accused bench.

Lastly, it would be unfair to the struggling return or deportation bureaucrats to portray them as outright shirking or resisting implementation or outright failing in their mission. In many senses, they, as respondents, show a strong commitment to fulfil their duties. Much of the material in the empirical parts of this chapter have a certain bias towards problems and challenges faced by the deportation bureaucrats. In many ways, it is typical of implementation research to paint a gloomier picture than the underlying facts deserve.

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# Migration, Trade Unions and the Re-making of Social Inclusion: The Case of Territorial Union Engagement in France, Italy and Spain

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## INTRODUCTION

As of 2022, the European labour market and employment relationship are developing in highly problematic ways, with many workers increasingly exposed to vulnerable working conditions and employers who do not always recognise employment legislation and rights at work. The question of how trade unions and social organisations reach out to this unprotected workforce and ensure they are informed of their rights is becoming a more

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challenging task because of the increasingly non-unionised environment as well as hidden areas of work and groups of workers (Doellgast et al., 2018). The way the threat of dismissal is used to undermine workers' rights, alongside the veil of silence that comes with workers being unable to communicate or follow up on issues such as long working hours, dangerous working environments or bullying management, makes them particularly exposed to exploitation or 'super-exploitation' (see Portes Virginio et al., forthcoming). There have been attempts to organise such workers through campaigns and the targeting of rogue employers (Barron et al., 2016). Many trade unions have tried to access such workforces through meetings, support services, the printing of materials in various languages and much more.

Yet, reaching migrant workers, especially if undocumented, and organising them has always been considered to be difficult. In part, this is due to the lack of coherent strategies and a prevalent focus on specific short-term issues without consistent efforts to develop a longer-term relationship between these workers and social or trade union organisations. However, the increasingly flexible and precarious nature of the labour market and the fragmented nature of jobs and occupations, especially those employing migrant workers, create further obstacles for trade union presence and action. Other challenges emerge from the specific needs of migrants, as dependent on their migrant status, consisting of a wide realm of non-work-related issues that facilitate the exploitative use of these workers by employers. Their legal status in the host countries in some cases and social forms of discrimination can contribute to this insecurity. Such vulnerability has become even more evident during the Covid-19 pandemic. Migrant workers, in fact, have been among those 'key' workers more exposed to the virus but also among those in the most uncertain precarious conditions due to the increasing unemployment, ban to international travelling and a difficult access to support, such as housing and health services for instance, in the host countries.

Trade unions are caught between different roles and functions in terms of how they represent workers (Hyman, 2001), including migrant workers. There is always a tension between different approaches and whether trade unions engage with the state, employers or groups of workers themselves as well as whether they actually are based on direct forms of activism or the provision of support services. Much depends on the context of the industrial relations system and the traditions and policies of migration that sit within them (Marino et al., 2017; Connolly et al., 2019) and, therefore, the chapter will outline core developments in terms of union strategies and shifts across Europe (see also Bender, 2023, this volume).

After such discussion, the chapter will focus in on France, Italy and Spain. It will look at how local spatial engagement and a local presence has been developed to engage increasingly exploited groups within migrant communities. Through these forms of local engagement, trade unions in these countries address migrants' social rights more broadly and offer practical support which is increasingly relevant not only in times of crisis, as during the Covid-19 pandemic, but more generally in consideration of the rather widespread progressive reduction of migrant rights (civil, social and political) in the host countries (Hollifield et al., 2014). In Italy and Spain, the specific form of engagement through local centres has built on the territorial dimension of trade unionism that, in southern European countries, has historically flanked and complemented the industrial and workplace structures of the labour movement. In France, however, there was a degree reticence about building support structures and separate sections, especially at the local, territorial levels of the union. The three national cases look at a specific set of unions that have, in general, a similar class-based and to some extent social discourse and background (Hyman, 2001), but that have been attempting to accommodate new forms of migrant voice and support mechanisms. Such cases are not representative of most European initiatives but are examples of how structural challenges and reflections develop within trade unions as they 'approximate' themselves to questions of social inclusion for such constituencies. Not only does this chapter outline aspects of these operational activities and their significance for a debate on social inclusion, but it also surveys their problems and limitations as the nature of migration has increasingly changed amid worsening labour conditions and greater tensions in the political context. What is more, there are new voices and actors linked to, and within a range of, migrant communities that also have significant implications for the way the politics of social inclusion is re-shaped as well as the way trade unions need to engage locally, specifically in relation to migrant communities (e.g. Nachemson-Ekwall, 2023, this volume).

### TRADE UNIONS, MIGRATION AND THE WIDENING OF SOCIAL INCLUSION NARRATIVES

Past research on trade union engagement with migrant workers has widely underlined how labour organisations have historically displayed a rather hostile, even exclusionary, attitude towards migrant workers. To a large extent, this has been due to the perception that migrant workers undermine labour market conditions and the rights of native workers,

representing a threat for labour organisations themselves and bargaining structures (Castles & Kosack, 1985). The assumption that migrant workers are a ‘reserve army’ also explains the rather widespread efforts by trade unions to resist liberal migration policies, which is another rather common issue across national contexts (Penninx & Roosblad, 2000). In the course of time, however, trade unions have slowly started displaying a more inclusive approach to migrant workers for a variety of reasons. In some contexts, for instance, the increasing presence of migrant workers in the national labour market has been sufficient to raise awareness on the importance of protecting the rights of these workers based on arguments such as international solidarity or human rights. In other contexts, trade unions have considered the increasing presence of migrant workers as an opportunity to strengthen union membership by recruiting these ‘new’ groups of workers (Milkman, 2006; Martínez Lucio et al., 2017). In some contexts, including some of the so-called old countries of immigration, trade union approaches to migrant workers remain rather underdeveloped, with elements of an exclusionary attitude still persisting (for an overview see Marino et al., 2017).

Union approaches to the representation and inclusion of migrant workers vary strongly across countries, reflecting the specific economic, social and political contexts, as well as factors related inherently to trade unions and migrant workers. In general, the literature underlines how union engagement towards migrant workers can develop through universalistic stances (representing migrants as workers) or through particularistic stances (representing migrant workers as migrants). In the first case, trade unions generally try to include migrant workers within the existing structure and represent them through existing strategies and tools but without varying them to take in account the specific needs and interests linked to their migrant status. This is often referred as a class-based or colour-blind approach, which results in the inclusion of migrants in so far that the rights and interests of the latter coincide with those of native workers (Penninx & Roosblad, 2000; Bender, 2023, this volume). Some scholars refer to this as ‘subordinated inclusion’ (Mulinari & Neergaard, 2005), underlining the limited extent of transformational equality in terms of organisational and bargaining structures.

Particularistic stances and strategies, instead, have been developed with the aim of collating and representing the specific interests and needs of migrant workers. These attempts would result in a transformational effort in terms of structures and representative action in unions. Examples are



widely documented across countries, including initiatives aimed at reaching out to migrant workers and unionising them. Specific actions, like the translation of union material into different languages and the provision of training to migrant workers, are rather widespread (e.g. Heyes, 2009; Perret et al., 2012). Some actions are more specifically focused on increasing union voice and participation into union structures through, for instance, the establishment of migrant advisory bodies and the provision of support to self-organised groups. Some scholars underline how the mere presence of these bodies is still not sufficient to determine effective inclusion, since the extent to which these bodies are linked to the organisation and have effective power in influencing union decisions must be taken into account (e.g. Marino, 2015). In terms of representative strategies, research highlights union efforts to include special claims in the company level (and more rarely sectoral level) collective bargaining (Marino, 2012; Tailby & Moore, 2014). These claims, including, among others, longer holidays or leave of absence for administrative reasons (e.g. related to renewing work permits), were successfully included in some negotiations, although examples remain rather limited. In recent times, ‘inclusive’ collective bargaining is occasionally being linked to union attempts to extend existing protections to migrant workers in ‘difficult’ contexts (Berntsen & Lillie, 2016; Wagner & Resflund, 2016), taking a rather class-based approach, thus characterised by the aforementioned limitations.

Another set of special interventions, less documented within the academic literature, concerns social and citizenship rights of migrants. The representation of these rights is defined as a pre-condition to achieve full inclusion (Marino, 2012), but it is often disregarded in the formal union debate since it is not considered as a domain of union action. In this field, union action is rather varied in terms of levels and areas of interventions. Several examples relate to initiatives at national levels on issues like fights against racism and discrimination, policies related to family reunification and the rights of undocumented workers (e.g. Barron et al., 2016). Other examples are found at territorial levels and are related to union support on practical matters related to the social status of migrants, including the renewal of residence permits, family reunifications, as well as access to both health care and housing. In some contexts, services are developed in a rather structured and systematic way, a result of specific factors and conditions, as we show in the next sections. However, examples of a more informal engagement with social or citizenship rights, on a more voluntaristic and ad-hoc basis, are present in several contexts.

In the following sections, we look at examples of union engagement with migrant social rights and forms of union territorial presence and specific organisational representative strategies. We argue that, due to the changing context within which trade unions are embedded and operate, these forms of engagement are becoming more and more central in representing the rights of precarious and migrant workers despite the emerging challenges that we also consider below.

### THE REDISCOVERY OF THE TERRITORIAL DIMENSION OF UNION REPRESENTATION

One innovative element in the debate on migration and trade unions is the emergence of an interest in the territorial dimension of the latter's engagement. The precarious and fragmented nature of work common to various groups of migrants inherently limits their access to stable workplaces and structures, within their organisations, to raise concerns and develop some type of participative mechanisms. Much depends on the nature of employment, the sector and the employer. The over-representation of migrants in labour-intensive sectors like agriculture, hospitality, individual transportation and similar (Kazlou & Wennberg, 2023, this volume), along with the prevalence of small- and medium-sized firms and the increasing presence of platform-based employers—provides scarce opportunities for a sustained dialogue on working conditions with their employers (McDowell et al., 2009). Much is also due to the role of the state—through complex visa and regulatory systems—that sustains the employment of specific groups of migrants, often regardless of skill levels, within quite unstable, vulnerable and undocumented forms of work (Anderson, 2010).

This has led to a growing interest in the use of forms of organising such workers and of generating points of access to them that focus on local non-workplace centres or structures within trade unions (Holgate, 2015). Within the United States of America (USA), the role of community unionism and worker centres has been seen to be at the heart of organising, providing spaces for immigrant communities who have not been able to access the more organised or regulated parts of the labour market and, indeed, the established industrial relations system (Fine, 2007). Although many of these centres are organised by third actors such as social movements and religious organisations beyond the scope of the established trade union movements (Nachemson-Ekwall, 2023, this volume), there is

generally much interest in such approaches within the labour movement. In fact, the notion of the community and of mobilising on working conditions through campaigns within communities is at the heart of a prevalent school of thought within the new wave ‘organising’ literature in the USA. McAlevey (2015) argues that it is essential to locate mobilisations and campaigns on worker rights within a ‘bottom-up’ perspective that locates itself within community dynamics, politics and its ‘leaders’. This also leads to the need to understand how migrant workers in such sectors use different forms of spaces—local, community and virtual—for their activities and activism on work-related issues (Roca & Martín-Díaz, 2017; Roca, 2020). This is vital to the way worker rights in precariously employed communities can be developed and voice mechanisms articulated.

However, in some cases, we see that trade unions manage to organise across these spaces by virtue of their pre-existing organisational structures: those with a tradition of active territorial (regional or city) structures that parallel their industrial, sector structures are known to use these local spaces to develop supportive strategies and services for migrant communities. This is the case in the three countries under analysis—France, Italy and Spain—which all present consistent and continuous union engagement with migrant social rights along a territorial dimension. This analysis is based on empirical data that was collected by the authors during the course of different research projects and interactions with trade unions and migrant communities.

The data on the Spanish case mostly relies on a wider project on the Netherlands, Spain and the UK, which consisted of over 150 interviews with trade unionists and workers, among others. The Spanish part of the research covered a selection of cities in the centre and north of Spain (Madrid, Toledo, Valladolid, Ciudad Real and Oviedo): it consisted of visits to trade union centres and over 50 interviews with their staff and the relevant union between 1998 and 2012. Data on the Italian case are drawn from doctoral research carried out between 2005 and 2009 on Italian and Dutch trade unions and consist of over 20 interviews with Italian trade unionists at different levels, plus analysis of trade union documents and participant observation. This data is supplemented by interviews carried out within a three-year ESRC project (2012–2015) comparing Italy, the Netherlands and the UK. The data from France draws on ethnographic research and interviews since 2003 on French trade unions from ESRC-funded doctoral research (2002–2008) and British Academy-funded research from 2017–2018. The observations include the *permanence*

(advice surgery) for undocumented workers organised by the *Confédération Générale du Travail* (CGT—General Confederation of Labour) in the Paris region and interviews with key actors involved in the movement.

### THE CASES OF FRANCE, ITALY AND SPAIN

Despite differences in terms of immigration history, with Italy and Spain being more recent countries of immigration than France, the three national contexts present similarities in terms of migrant presence within the national labour markets. Migrant workers, in fact, are overrepresented in the most exploitative niches of the labour market as result of both the high demand for migrant labour in the wide irregular and underground segments (e.g. Reyneri, 1998) as well as the restrictive and highly bureaucratic nature of the regulation of immigration common to the three countries. Even when documented, migrant workers tend to be employed in sectors like construction, agriculture, domestic work and hospitality, all characterised by seasonal, temporary, short-term jobs as well as by a high level of turnover. These conditions have not allowed trade unions to develop the stable and structured workplace relations with migrants that is typical of other sectors. This has required the trade unions to diversify their strategies by focusing not only on trade union presence in the workplaces but also within specific territorial areas. Starting from the 1990s, union presence at the territorial level has increasingly become an important reference point for migrant and vulnerable workers in all three national contexts.

In Spain, trade unions developed a network of information offices and centres in virtually every major city. In particular, the *Comisiones Obreras* (CCOO—Workers Commissions) and the *Union General de Trabajadores* (UGT—General Workers Unions) established these structures in the union's local city and town offices, linking them to their general local roles (Martínez Lucio & Connolly 2012). Similarly, in Italy, the three main union confederations started establishing local offices already in the mid-1980s to respond to the increasing demand for services by migrant workers in the North of the country where the number of documented migrants was greater. The *Confederazione Generale Italiana del Lavoro* (CGIL—Italian General Confederation of Labour), the most representative Italian Confederation, in particular, established a widespread network of local *Uffici Immigrati* or *Centri Immigrati* (Immigrant Offices/

Immigrants Centres) within the territorial units of the trade union (the so-called *Camera del Lavoro*).

In both Italy and Spain, the role of these structures has been to act as a first port of call for immigrants in relation to work- and other social-related concerns. There are many immigrant centres and law firms focused on these types of activity, but none can compare to the sheer extent and breadth of the union network—something that is unusual in most European nations. A range of individuals have been employed in such centres. Although these are not immigrant-led offices, they may have trade unionists involved from an immigrant background (Martínez Lucio et al., 2013). In Spain, there could be up to half a dozen people working in one capacity or another, although numbers vary between offices. Services are free to migrants and do not require union membership, although they became an important channel for unionisation in both countries since migrants often joined the organisation following union support.

One feature of this new form of engagement with immigrants is that the state provides a wide range of funding for such resources. This allows trade unions, which are identified as being a key part of the provision of such services, to develop trade union-oriented information and a strategy of support centres more generally. Such centres provide a range of information services in relation to employment, citizenship, social rights and housing—among others. In Italy, these offices help with applications for work permits and entry visas, renewal and duplication of residence permits, family reunification, asylum applications, as well as mediation with local authorities and the police. Following the 2002 amnesty for irregular migrants, CGIL worked on the regularisation of foreigners, handling bureaucratic requirements and offering legal services to migrants when employers refused to regularise them. In 2006, an agreement between the Ministry of the Interior and the trade union devolved responsibility for the regularisation procedure and defence of migrants' social rights to the *Istituto Nazionale Confederale di Assistenza* (INCA—National Confederal Institute of Welfare Care) of the CGIL. From then on, the work of these offices increased progressively.

The unions were expected to keep clear records of their activities, and these data provide evidence of the importance of such interventions. In 2006, for instance, 27,200 legal cases were initiated by the *Camera del Lavoro* in Milan (which, at the time, had a foreign population of 170,000 residents); 37 percent concerned work permits; 22 percent residence permit renewals, family reunification and asylum applications; 6 percent

concerned individual problems and were resolved with the help of a lawyer; 15 percent involved mediation with municipal offices; and 20 percent the provision of general information. Among CCOO offices related to migrant workers (Centro de Información al Trabajador/a Extranjero/a, CITEs), some local offices attended to at least 3000 individuals a year. As worker centres they were mainly information-based in their approach to attending to immigrants. They open a file for each worker, logging it on a main server so the worker can return for further advice; this is then stored centrally. In comparative terms across Europe, the experience of the CCOOs and the UGT's developments in this area were accepted as a leading benchmark and good practice at the time.

In contrast to the structures set up specifically to deal with migrant workers in Italy and Spain, there was resistance to establishing any form of separate structure or service for migrants in France before the late 2000s. Following the French tradition of republican assimilation, unions developed a 'universalist' approach to representation. Even when establishing an informal structure in favour of the discriminated fringes of the population (see below), their strategies remain imbued with this universalist or class-based approach: workers are workers, not specifically precarious migrant workers (Tapia & Holgate, 2018). The unions focused on anti-racist and discrimination campaigning and on supporting migrant workers through training and rights awareness rather than specific workplace/industrial organising strategies to achieve recognition or collective bargaining (Tapia & Holgate, 2018, p. 200).<sup>1</sup>

While the CGT union had historically supported undocumented workers' campaigns (Siméant, 1998), it had never engaged in the systematic representation of individual rights and interests of undocumented migrants. It also had not specifically worked to increase membership or access to decision-making processes within the union among migrants. The CGT's strategy towards undocumented workers evolved noticeably in the late 2000s. This development occurred gradually, triggered by strikes initiated by undocumented workers (Connolly & Contrepois, 2018). Migrant workers find it difficult to integrate within the existing

<sup>1</sup>An exception is the representation of a group of mainly Moroccan workers working for SNCF, the railway company, who were supported by the CFDT and SUD-Rail to improve their terms and conditions (Chappe, 2021).

company and territorially based structures<sup>2</sup> as their extreme precariousness not only means that they change occupation regularly but that they are also very geographically mobile. Hence, the CGT considered changing the existing provisional structure into a national-specific structure for these workers, where they would remain until they become established in a particular company or economic sector. This was the subject of much intense debate in the confederation, and there was resistance to creating any kind of national formalised separate structure for migrant workers (Contrepois, 2016).

In the CGT, the '*collectif confédéral migrants*' was set up as a form of national structure at the end of the 2000s. It was led by a French national union officer in charge of migrant workers and clandestine work. The aim of creating a specific nationally based organisation was to maintain contact with precarious and/or undocumented migrant worker members, characterised by not just high levels of geographic and job mobility but also, above all, a high degree of precariousness.

Strikes occurred in sectors like construction and hospitality, where unions were weak or non-existent. The mobilisation and lobbying eventually led to two new *circulaires*, in 2010 and 2012, clarifying the processes and establishing criteria for the regularisation of undocumented workers. In particular, they designate the number of pay slips that are needed, depending on the length of time in the country. The *circulaires* facilitate the regularisation of undocumented workers and allow a link to be established between the worker's real identity and his or her fake identity in order to reassign rights to the former. In order to guarantee the application of the *circulaire*, the CGT made informal links with these workers and then opened a weekly *permanence* (advice surgery) in September 2014 at the national confederal level in Paris as part of the work of the national *collectif confédéral migrants* and the territorially based union representing the Paris region.

However, the national migrant collective structure was not seen as an end in itself, but rather a way to integrate migrant workers, with the ultimate aim of linking migrant workers with the traditional professional and territorial structures. Lucie Tourette, a journalist who contributed to a book on the 2008 undocumented workers' strikes (Barron et al., 2011), shows how, in 2018, a number of the undocumented migrant workers

<sup>2</sup>Territorially the unions organise around local unions, department unions and regional unions, as well as having company union sections.

involved in earlier union action found employment in large companies, joining the occupational and territorial structures. Several of them took responsibilities within their company and sector union, based on the experience they accumulated during the undocumented workers' strikes. When hundreds of undocumented migrants went again on strike in 2018, their delegates, who were either former or existing undocumented migrants, were able to lead the movement (Tourette, 2018).

The new regularisation criteria, which requires undocumented workers to seek regularisation through their local *préfecture* has shifted the locus of union action and activity towards undocumented migrants to the territorial and local level, with a greater need to have local union expertise to compile and process individual dossiers of undocumented migrants.

#### CHALLENGES RELATED TO THE DEVELOPMENT OF TERRITORIAL AND SPATIAL-BASED INCLUSION STRATEGIES

The union strategies described are also characterised by some limits. Certain critical aspects are, to some extent, similar across the countries, pointing to an ongoing challenge with respect to how social inclusion strategies should be structured and developed within a range of organisations and across various levels.

In the case of Spain, there were concerns within the CCOO locally and some activists that there was a need to connect traditional CCOO work into the CITE and the workers they were representing. The CITEs of the CCOO, for example, were not always connected to, or responsible for, broader social activity, coalition building, or communication strategies with the local immigrant groups. This was driven mainly by the immigration departments of the unions themselves and those coordinating some of the offices in question. Hence, the actual service provision element was sometimes separate from the union's broader immigration-related strategies. In the geographic areas studied, links with organised immigrant groups were sporadic, as far as the unions were concerned, due to the problems of sustainability that such groups had. This varied according to the extent and politics of different immigrant communities. In some cases, there was an acknowledgement that the service had become more detached. In 2009, the CCOO began to fuse its immigration section into its employment section, which led to a joint department at the national and regional levels—although this mirrored developments in certain state



departments. This was seen as a vital step for integrating the issue of immigration into the mainstream of the union's work. There were also discussions around building a more proactive network of CITE activists throughout the country with the aim of using it for information gathering and as a link to the immigrant population. Thus, this question of fusing the community dynamic into broader strategies around social inclusion and union activism is a challenge, even if the experience of information centres, like those in Spain, is viewed as one of the most elaborate in Europe. For the UGT, this was a bigger problem, with their migrant worker offices being considered to be part of the servicing logic of the union. Relevant activists in the specific regional union structures were, for example, concerned with the way local regional leaderships were increasingly disconnected from the local dimension and community dimension of the union, where once they would have visited local sites more often. There was a concern that such centres did not consistently connect in representative terms with broader migrant workers' voices, even though, over time, such offices have evolved around broader issues.

In the Italian case, although the importance of migrant offices in defending migrants' social rights was recognised across the entire union, the emphasis on service provisions was often a source of concern by some parts of the union. The most radical critics considered these bodies as service providers unable to carry out any representative function for migrant workers and likely to hinder their active participation as well as their identity-based adhesion to the trade union. Some interviewees declared that the people working in such offices were regarded not as trade unionists but more as civil servants who viewed migrants as customers rather than workers. Furthermore, concerns were raised in relation to the fact that these bodies were the only ones dealing with migration issues, resulting in a general disinterest and lack of commitment on such matters by other structures within the trade unions. This concern is especially expressed by those who consider these offices as provisional structures designed to be mainstreamed once the migrant issues were fully included in trade union culture and everyday work. In both national cases, the economic crisis caused by the 2008 financial crisis and the worsening of labour market conditions is creating more difficulties for trade unions in relation to the provision of special services (De Luca et al., 2018). The scale of the resources spent on migrant workers issues might become very difficult to justify in a moment of decreasing resources and worsening of the social and economic climate.

In France, the servicing of undocumented migrant workers through the provision of support for regularisation represented a clear shift in the strategy of the CGT, which had hitherto avoided a servicing approach. The fact that the regularisation cases had to be dealt with at an individual and at a local level provided both opportunities and challenges for the CGT. Undocumented migrant workers pushed the unions to go further, to call for nationwide amnesty campaigns for undocumented migrant workers, rather than the cumbersome, bureaucratic and individual approach at the local level. These workers even staged demonstrations against the CGT in the Paris region. The challenge was also to make sure that the relevant and necessary expertise in the territorially based union structures is there to deal with the undocumented workers' cases for regularisation.

Irrespective of these strategic and political challenges, this aspect of trade union intervention has been one of the most significant in the EU not only because it has provided important support on practical matter in a context where other institutional support has been absent, but also because it contributed to raising the visibility of trade unions among migrant workers. It also contributed to building the perception of trade unions as 'allies' in a context which often perceived as indifferent if not hostile. This has positively influenced the unionisation of these workers.

The development of a community-facing agenda based on local structures and offices which invite workers in to discuss and seek support has forged a series of debates about the role of union structure. This dimension, in fact, is becoming more important following the rise of flexible jobs since it is increasingly concerning vulnerable and precarious workers not necessarily with migrant background, in difficult and hard to reach segments of the labour market. The increasing fragmentation of work and the exploitative nature of working relations, in fact, is pushing trade unions to provide an alternative to working places as spaces for the socialisation and the representation of workers, even in national contexts with a well-established union presence.

The challenge in terms of inclusion is the extent to which these structures have been able to move beyond the provision of services (promoting social inclusion more widely), deepen their political significance and constitute a channel for migrants' involvement and participation in the unions (promoting inclusion in the labour movement). The cases considered, in fact, underline how these structures are established and run by trade unions as well as how these work in line with trade unions' views and

established guidelines. While they might be called to coordinate and develop specific policies and initiatives, their influence on union decision making is often rather low. Furthermore, as already stressed, these bodies were not established *by* migrants but rather *for* migrants, although they often employ unionists with migrant or equality backgrounds. In some cases, as for instance in Italy, these territorial offices co-exist with (industrially based) migrant self-organised bodies established to increase the voice and influence of the migrant constituency within the union. Although the relationships between territorial and sectoral-based structures have showed some divisions, they have also facilitated the emergence of a network of migrant activists able to cooperate and coordinate on important matters.

### CONCLUSION: CONNECTING IN A DISCONNECTED CONTEXT

The provision of representation and defence of rights other than industrial ones (social or citizenship rights for instance) is relevant not only in terms of supporting vulnerable workers but for trade union renewal: it brings to the fore trade union roles as social and political actors, something that is increasingly part of the industrial relations debate. Therefore, whilst much is to be said about the use of social media, the importance of locally embedded facilities remains important. Although the current context and the Covid-19 crisis put a lot of pressure on the ability of trade unions and other social organisations to develop these resources, there are still lessons to be learnt.

The union engagement with the territorial and spatial dimension is a good example as to how social inclusion strategies evolve and are contested even within specific dimensions. It is not just a debate about where to focus organisational attention and resources (workplace strategies, community strategies, employer relations social dialogue and others) but also about how the dynamics of change and forms of contention affect each individual aspect. The local territorial space in many countries is less developed, given the industrial nature and workplace focus of their union activities. Yet, in the examples given here, there is a rich heritage of engagement at the level of the locality and a territorial dimension that has helped shape forms of intervention and support at a level appropriate for more vulnerable migrants. This dimension allows workers who are not always employed in stable workplaces and employment to be supported (through advice, activism and other forms) in local communities. The Covid-19

pandemic has contributed to the need to underline the importance of this dimension and of a wider union engagement at the local level. It requires a broader reflection on the role of unions as social actors as well as on the way initiatives and instruments are to be developed to support migrant and other vulnerable groups of workers within local communities.

However, this dimension itself is subject of contention, as the question becomes to what extent service provision linked to these initiatives have been hierarchically driven as a strategy or have been inclusive of migrant workers in terms of decision making (engaging them, for example, in broader debates within the union). Therefore, this means that we need to view trade union approaches to social inclusion as a space where various interventions and debates take place based on the identity of the union, the overall heritage of its approach and the nature of the workforce it is attempting to involve. Yet, how these are linked to broader emancipatory politics and visions of social inclusion is a critical question.

Further, and of general relevance to all the above cases, is the rise of the gig economy and new forms of work that tend to generate the need for more agile or flexible forms of mobilising and organising. These do not necessarily fit the forms of more institutionalised organisation socially and spatially, even though public space is important for these new dynamics. Much of this critical view points to the emergence of different local spatial strategies that may not be fixed in terms of specific physical centres: hence alternative approaches may need to be considered in terms of more informal public spaces along with social media when it comes to the gig economy (Cant, 2019; Geelan, 2021).

The nature of employment in such sectors also points to a new range of more flexible and independent forms of worker organisation that organise more directly and where public space is key to social encounters and protests (Alberti & Peró, 2018; Peró 2020). These new dynamics see local space in broader and less constrained terms: as more socially diverse, ranging from the use of existing available venues to online forums. However, one should not underestimate the initiatives and extent of collaboration between some of the more established unions and these new organisational forms (Smith, 2022). There is also the presence of increasingly intersectional-based movements and politics that urge us to view migrant workers' needs and interests as deriving from the intersections of a broader range of statuses and identities. This perspective questions homogenous solutions that often ignore questions of gender and age, for example. It

also encourages the building of more inclusive and democratic union processes with respect to diversity (Alberti et al., 2013).

These limitations have been exposed as well by the way migration has become a more sensitive political issue pushing the use of such offices into a broader role. The way unions offer services to—or represent—migrant workers is increasingly challenged by reactionary and xenophobic political organisations and interests, which contributes to increasing tensions between workers and their representative organisations. Xenophobic attitudes emerging on some occasions within the union rank and file constitute an important challenge to the more progressive aspects of the trade union movement and generate uncertainties in the way union strategies will develop.

The chapter shows how the question of trade unions and how they align to the needs and dynamics of migrant communities requires us to evaluate the different industrial, spatial and social strategies that trade unions develop. It is not simply a question of ‘responding’ or ‘fit’. The chapter also illustrates how the territorial and spatial dimensions are key to the organising, representing and supporting migrant workers in labour markets that are increasingly decentred and fragmented as well as in times of crisis. However, there are tensions between supporting and engaging or including migrant workers through such structures. There are further tensions in terms of how they provide spaces for broader worker activity beyond immediate questions of informational and technical support. To this extent, they reflect some of the broader dynamics and ironies of social inclusion strategies that call forth the need for more innovative approaches to questions of agency and structure as well as novel and direct forms of migrant inclusion in the processes.

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# Swedish Trade Unions and Migration: Challenges and Responses

*German Bender* 

*“Everyone shall be unionized and covered by collective bargaining agreements. If any group is left outside, there is a risk that they accept wages below agreement levels. The Swedish Trade Union Confederation (LO), and other central and local unions, have woken up late.”*

Bertil Jonsson, President of LO, December 1995 (Neergaard, 2018)<sup>1</sup>

## INTRODUCTION

Sweden presents an interesting case study of the challenges migration can pose to industrial relations in general and trade unions more specifically. A highly unionized country with (until recently) generous migration

<sup>1</sup>Translated by the author from the original Swedish citation: “Alla ska organiseras i facket och omfattas av avtal. Om någon grupp lämnas utanför finns det risk för att de tar jobb som ligger under avtalslön. LO och övriga fackliga organisationer—centralt och lokalt—har vaknat sent.”

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policies, Sweden has received large volumes of migrants in the past decade, both labor migrants from EU member states and refugees from so-called third countries (outside the EU/EEA).<sup>2</sup> In tandem with this development, having a non-European background is becoming an increasingly salient characteristic of worker precariousness and unemployment (especially long-term), a pattern that was exacerbated during the Covid-19 pandemic. This labor market divide between native and migrant workers is, as of 2022, one of the most ingrained structural problems in the Swedish labor market. A third trend is that trade union density has declined sharply, especially among foreign-born workers, and overall in sectors and types of employment where migrant workers are predominantly found. Taken together, these developments form a pattern where the fastest-growing segment of the Swedish workforce is simultaneously the one in which unionization is dropping the most and where working conditions are the most precarious. This poses significant challenges to trade unions and to Swedish industrial relations more broadly.

The present chapter examines these trends and challenges in more detail, as well as the main responses from labor unions.<sup>3</sup> It provides an overview of studies on trade union membership among foreign-born workers in Sweden, as well as on their representation in the labor market and among Swedish trade union members. It also offers an assessment of some key challenges that Swedish trade unions face in a post-pandemic labor market characterized by a growing divide between native and migrant workers, and in a political environment with diminished support for center-left parties and increased support for the radical right. Although this chapter does not present a comparative study, the analysis is occasionally complemented with data from other European countries (Chap. 7 in this volume, Marino et al. 2023, presents case studies on unions strategies in France, Italy, and Spain). While focus lies on current and future challenges, the chapter also takes stock of the period since 2006, which covers a number of key events related to migration and industrial relations: a severe blow to unionization by the center-right government of 2007, the deregulation of labor migration by the same government in collaboration with Miljöpartiet (MP—Green Party) in 2008, the general election of

<sup>2</sup>In this chapter, the term migrant workers refers to all foreign-born workers (i.e., blue- and white-collar, labor migrants, and refugees).

<sup>3</sup>The terms unions/labor unions/trade unions are here used as synonyms, as are workers/employees and industrial relations/employment relations.

2010, which granted the radical right-wing party Sverigedemokraterna (SD—Sweden Democrats) representation in parliament for the first time, the large influx of refugees in 2015, and the Covid-19 pandemic of 2020–2022.

The chapter draws broadly on scholarly work on migration and employment relations. The empirical parts are based on secondary data from policy reports, legislative documents, collective agreements, and media sources.<sup>4</sup> The text is also informed by the author’s own research on institutional factors in Swedish industrial relations and his experience of working in the Swedish trade union and think tank environment since 2007. The purpose of this chapter is not to give a detailed account of consistently comparable data, but rather a broad overview of the main patterns that characterize the Swedish labor market in terms of migration, as well as the challenges posed by migration to industrial relations in general and trade unions specifically.

## MIGRATION AND THE SWEDISH LABOR MARKET

### *From Humanitarian Superpower to Migration Hawk*

Migration has become an increasingly contested issue in Sweden. The single most important catalyst for the restrictive sentiments that dominate Swedish migration politics today was the so-called refugee crisis of 2015. In that year, the nation received almost 160,000 asylum seekers, mostly from Syria and Afghanistan (Eurostat, 2016), among the highest numbers of refugees in the EU relative to recipient country population. This quickly led to pivots among almost all parties, especially Socialdemokraterna (S—Social Democrats) and the conservative Moderaterna (M—Moderate Party), both of which had previously been more welcoming toward migrants (Neergaard & Woolfson, 2017). Initially, this new consensus on migration skepticism in the parliament mainly concerned refugees; however, more recently, the broad political consensus to reduce immigration also includes labor migration. For instance, almost all residence permits now granted for refugees in Sweden are temporary (whereas before 2016

<sup>4</sup>As for the statistics and figures, sources can vary with regard to age intervals (normally 16–64, 20–64, or 15–74), time periods, definitions (foreign-born, foreign background/parents, EU/non-EU, etc.), and categories (student/retired members included or not, questionnaires or register data, etc.).

they were generally permanent), more stringent rules apply for family reunions, and stricter requirements for financial support (i.e., salaried work) have been introduced (and, as of 2022, even higher levels are being considered by the government).

The political trauma of the refugee crisis still looms large, as indicated by the initial response from Sweden's Prime Minister Magdalena Andersson when asked about Sweden's preparedness for Ukrainian refugees from the war with Russia in February 2022: "We can never come back to the situation of 2015" (DN, 2022). This hawkish reaction to a severe humanitarian crisis in a neighboring country sharply departs from the modern Swedish (especially Social Democratic) tradition, dating back to Prime Minister Olof Palme in the 1970s and 1980s, when the country viewed itself as a "humanitarian superpower."<sup>5</sup> What does the trauma consist of and why is it so entrenched? To understand this we must return to 2010, when the Sweden Democrats managed to pass the threshold (four percent of the votes) required to gain seats in the Swedish Parliament. A radical right-wing party formed by neo-Nazis and anti-immigration activists in the 1980s, the party almost quadrupled its support between 2010 and 2022, attracting large numbers of voters from the two largest political parties (the Social Democrats and the Moderate Party). The refugee crisis of 2015 was a significant boost to the party, which has occasionally polled as the second most popular in the country (as of 2022 it ranks third). The political establishment's pivot to a more restrictive stance on migration (framed as a "breathing room" by the government; Statsrådsberedningen, 2015) should be seen in this light and is likely driven by at least three factors. First, there is a widespread fear of losing votes to parties with more restrictive migration policies, as voters prioritize immigration-related issues far higher than before (Valforskningsprogrammet, 2020). Secondly, there is concern among center-left parties that the Sweden Democrats' increased political influence will be detrimental to liberal democracy and minorities. Thirdly, there is a more openly expressed view among politicians and the general population (reflected in media statements by politicians, opinion polls, and in voter preferences and priorities) that migration can have negative social consequences, for instance in the labor

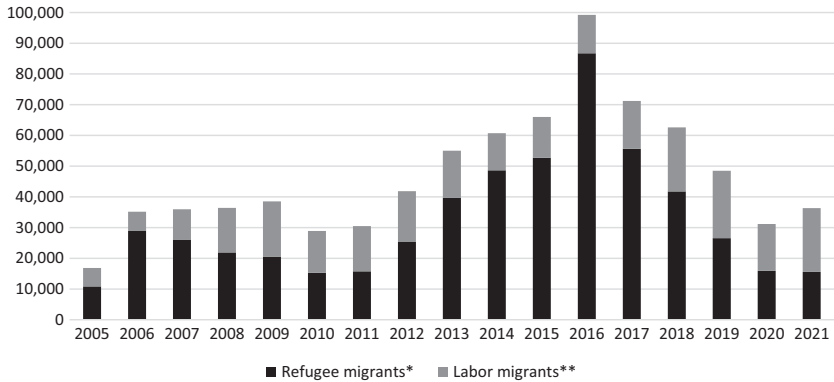
<sup>5</sup> Actually, this view is still widespread: the term has been used by both conservative and social democratic foreign ministers (Bildt, 2013; Sveriges Radio, 2015). It is associated with a positive view on migration and with Sweden's generous foreign aid policies.

market, the school system, criminality, and the welfare state (for an extended analysis of the latter, see Jerneck, 2023, Chap. 4 of this volume).

A development related to the Social Democrat's loss of votes to the Sweden Democrats, concerns Landsorganisationen i Sverige (LO—the Swedish Trade Union Confederation), a meta-organization for Sweden's 14 blue-collar unions. Traditionally, the Social Democrats are the most popular among members of blue-collar unions, but the balance is shifting in favor of the Sweden Democrats, in tandem with growing migration, and declines in both union membership and union density.<sup>6</sup> As we will see, these developments pose serious challenges for both Swedish industrial relations and, especially, blue-collar unions.

In the aftermath of the 2015 refugee crisis, labor migration has also become increasingly contested in Sweden. The debate centers around a 2008 agreement between the then liberal-conservative government and the Green Party, which turned Swedish labor migration policy into one of the most liberal in the OECD (OECD, 2011). Previous regulation required that Arbetsförmedlingen (the Swedish Public Employment Service) evaluate the need for labor migration to fill a specific position (i.e., establish if there was labor shortage) and allowed unions to verify that wages and other conditions conformed with collective agreements (Riksdagen, 2008; Riksrevisionen, 2016). The new Labor Migration Act of 2008 shifted the power balance to employers in allowing working permits for persons offered employment (under certain conditions). In 2020, about 35 percent of labor migrants had jobs that require tertiary education (e.g., programming, engineering, or research), and 36 percent did low-skilled work (e.g., agriculture, hospitality, construction, or transportation work) (Migrationsverket, 2021). As shown in Fig. 8.1, the number of refugees has gone down substantially since 2016, while the number of labor migrants has remained at about 20,000 per year, except during the height of the Covid-19 pandemic.

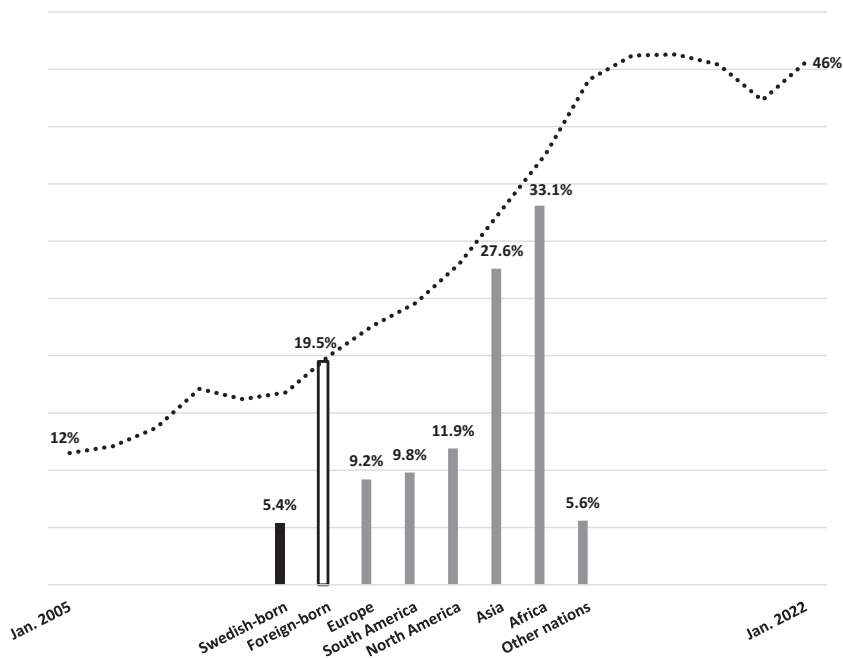
<sup>6</sup>Union *density* (or union affiliation) is defined here as the share of unionized persons in a specific group, for example, foreign-born, women, or construction workers. Union *membership* is the number of people who are union members. This means that union density can increase even as membership numbers decrease, if the labor market structure changes so that the number of jobs in a sector drops but a higher share of workers in those jobs is unionized. Inversely, union density may drop although membership numbers increase, if the number of jobs in a sector increases faster than union membership.



**Fig. 8.1** Refugees and labor migrants from third countries, 2005–2021. *Source:* data from the Swedish Migration Agency (Ekonomifakta, 2022a, 2022c). \*Residence permits for refugees. \*\*Work permits for labor migrants. *Note* that “third countries” are those outside EU/ECC (EU/EEC citizens can work in Sweden without a permit) and that, due to new labor migration legislation from 2008, the periods before and after are not fully comparable)

### *Foreign-Born Workers in the Swedish Labor Market*

As mentioned in the introduction to this chapter, the Swedish labor market is seeing increased segmentation between foreign-born and native workers (an interesting analysis of job segmentation and segregation is provided by Kazlou & Wennberg, 2023, in Chap. 10 of this volume). While labor force participation is high and unemployment low among native Swedish workers, foreign-born workers from outside the EU/EEA area and North America (especially from Africa, Asia, and the Middle East) are quite marginalized in terms of, for instance, lower labor force participation, higher unemployment rates, lower income, fixed-term work, and precarious working conditions (Fig. 8.2; Neergaard & Woolfson, 2017; Svalund & Berglund, 2018; Wingborg, 2019; Calmfors et al., 2021). Further, the Covid-19 pandemic resulted in an increase of approximately 29 percent in long-term unemployment (more than 12 months), which, as of June 2022, amounts to almost 180,000 people, roughly 60 percent of whom are foreign-born (Arbetsförmedlingen, 2021, 2022). Overall unemployment is 7–8 percent (January 2022), almost half of which is long-term. In addition to refugees (who by far make up the largest share of the foreign-born workforce in Sweden), labor migrants are

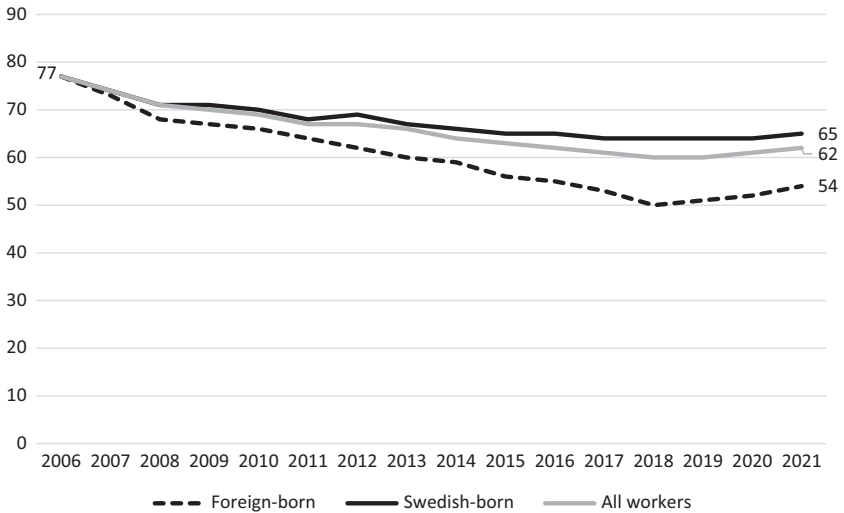


**Fig. 8.2** Foreign-born workers' share of total unemployment, 2005–2022, and unemployment according to country of birth, 2021 (15–74 years, percent). *Source:* Data from Statistics Sweden (Ekonomifakta, [2022b](#))

also included in most statistics discussed in this chapter (unless noted). However, they constitute a relatively small share of the foreign-born workforce and do not make up as large a part of the unemployment as refugee migrants (although some of them may count as unemployed, due to, e.g., terminated or false contracts).

In parallel with this dualization, which has increased over time, there has been a bifurcation in union affiliation. Union membership has declined significantly since 2006, but more so among foreign-born workers, especially in blue-collar professions (unless explicitly noted, all numbers in this section come from Kjellberg, [2022a](#)). In 2006, union density was the same for Swedish and foreign-born blue-collar workers alike: 77 percent. Fifteen years later, in 2021, it had dropped to 65 percent for Swedish-born and 54 percent for foreign-born. In other words, union affiliation among foreign-born blue-collar workers had dropped more than twice as





**Fig. 8.3** Union density among blue-collar workers, 2006–2021 (percent).  
*Source:* Kjellberg (2022a)

much as that of their Swedish-born colleagues (Fig. 8.3). The trend is similar among white-collar workers, but not as pronounced. In 2006, union density among foreign-born white-collar workers was 70 percent, and among the Swedish-born, 77 percent. In 2021 the foreign-born union density for white-collar workers was 66 percent, and among the Swedish-born, 76 percent.

The number of foreign-born union members is determined by two principal factors: first, the share of foreign-born workers in the professions or sectors organized by a particular union and, secondly, the degree to which that union is able to recruit foreign-born members. The decline in union density reflects declines in union membership and it is especially evident among non-EU workers. Between 2005 and 2020 the share of non-EU workers in the 14 labor unions of the blue-collar confederation LO doubled from 10 to 20 percent. If foreign-born workers from all other countries are included, the share is 26 percent, considerably higher than the 15 percent share of foreign-born workers among white-collar unions.

Another notable trend is that, although foreign-born workers have increased significantly both among blue-collar union members and in the workforce, they have not done so in parallel. While the share of foreign-born

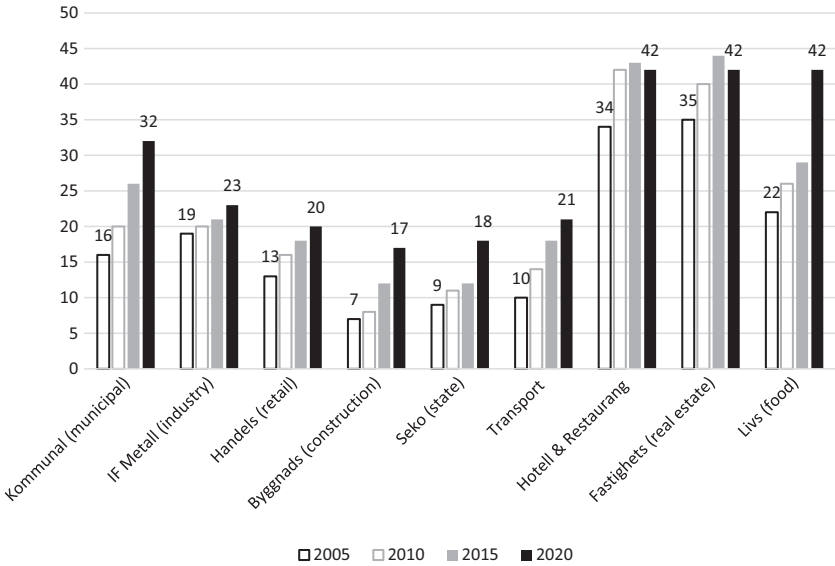
blue-collar workers in 2005 was the same among union members as in the workforce (16 percent), it was lower in 2020 (26 percent in unions and 29 percent in the workforce).<sup>7</sup> This reflects most unions' problems with attracting foreign-born workers, problems that are especially noticeable among blue-collar unions. Of course, large variations exist between unions and between sectors. For instance, in 2020, the share of foreign-born members in *Hotell-och restaurangfacket* (HRF—the Hotel and Restaurant Workers' Union), *Fastighetsanställdas Förbund* (Fastighets—the Real Estate Employees' Union), and *Livsmedelsarbetareförbundet* (Livs—the Food Workers' Union) was more than 40 percent. The blue-collar *Svenska Kommunalarbetareförbundet* (Kommunal—Municipal Workers' Union) and *Svenska Transportarbetareförbundet* (Transport—the Transportation Workers' Union) doubled their share of foreign-born members between 2005 and 2020 (to 32 and 21 percent respectively, see Fig. 8.4).

While unions have not been able to recruit foreign-born members at the same pace, as these have increased in the workforce in the past decades, overall union density (white- and blue-collar, domestic and foreign-born) has gone up slightly during the Covid-19 pandemic. The reasons for this have not been studied, but a likely explanation is that fear of being laid off during the pandemic caused an uptick in union membership among the employed. There may also be composition effects caused by the fact that unemployment during the pandemic predominantly affected employees in sectors with low union density and those with fixed-term contracts, who also have lower union membership rates. If these are no longer counted in union membership statistics, union density among the employed increases.<sup>8</sup> Foreign-born workers are overrepresented in both of these categories.

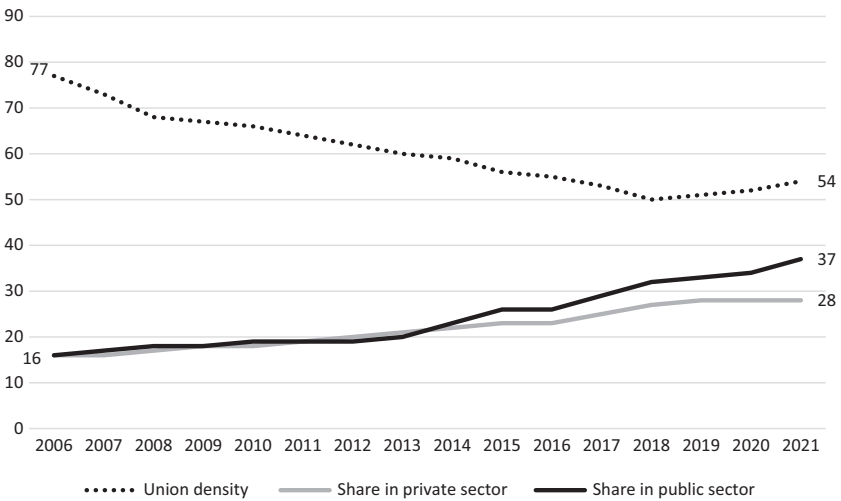
The decline of union affiliation among foreign-born workers is even more negative for overall union density than it may first appear. As illustrated in Fig. 8.5, this trend has occurred in parallel with a sharp increase in the number of foreign-born workers, who now make up a considerable share of the workforce.

<sup>7</sup>These figures only include workers who are registered in Sweden and, hence, do not include non-registered ("illegal") immigrants, posted workers from other EU countries, or international commuters (e.g., from Denmark, Norway, or Finland). If these were included, both union density and membership would be lower.

<sup>8</sup>It should also be noted that the decline in union density plateaued one year before the pandemic, but it is too early to tell if the negative trend has been broken or if it is a temporary phenomenon.



**Fig. 8.4** Share of foreign-born members in the major blue-collar unions, 2005–2020 (percent). *Source:* Kjellberg (2022a)



**Fig. 8.5** Foreign-born blue-collar workers: share of the workforce and union density, 2006–2021 (percent). *Source:* Kjellberg (2022a)

Future prospects are worrisome for the Swedish labor market model. The Swedish Public Employment Service has previously estimated that eight out of ten job vacancies must be filled with foreign-born workers (due to the low unemployment level and high labor force participation among the Swedish-born), making them essential for job growth in Sweden (Arbetsförmedlingen, 2018). This entails a structural problem for union density that will be exacerbated as the share of foreign-born in the workforce continues to grow, unless the negative unionization trend in this group (and other weakly organized groups see, e.g., Palm, 2017) is reversed. The problem is particularly challenging for blue-collar unions, as foreign-born workers are overrepresented in sectors with lower rates of collective bargaining coverage, like retail, restaurants and hospitality, and transportation.

### *Explanations for Lower Union Density Among Migrants*

Most studies investigating the rapidly declining union density among migrants in Sweden are descriptive in nature, with some of this research accounted for in this chapter (e.g., Wingborg, 2019; Kjellberg, 2022b). However, there are attempts to explain the trend. Kjellberg (2019a, 2022a) argues that some factors may be (1) the overrepresentation of migrant workers in sectors, occupations, and employment forms (fixed-term and part-time) with low union density (which, in turn, has many explanations, including lower wages, weaker unions, workers with weaker bargaining position, smaller workplaces, more union-hostile employers, etc.); (2) low income among migrants, making union fees burdensome; (3) the large share of refugees from countries with weak union traditions and skepticism toward unions; (4) problems related to language barriers, lack of knowledge about the Swedish labor market model, and other cultural differences that unions have been late and unsuccessful in addressing; and (5) institutional changes in 2007<sup>9</sup> that led to a sharp decline in union density, especially among blue-collar workers.

<sup>9</sup>In 2006, the liberal-conservative coalition government initiated sweeping labor market reforms leading to, among other things, higher fees for unemployment insurance, abolished tax reduction for unemployment insurance and union membership fees, reduced unemployment benefits, stricter rules to qualify for these benefits, and a new form of fixed-term employment with complete employer discretion. After the reforms, union density and membership figures dropped dramatically and are still considerably lower than they were before, although some white-collar unions have managed to recover the losses to some extent.

In a literature review of factors affecting union density and union membership, Palm (2017) discusses research that is relevant to several of these explanations. It should be noted that there are surprisingly few studies on factors driving unionization in Sweden, and she notes that “many factors have been observed to demonstrate mixed results between both countries and studies” (Palm, 2017, p. 36). That said, she finds little support for large effects of structural changes on union density, like an increasing share of foreign-born in the workforce, although she also does not find support for the opposite. Some structural factors seem to matter more than others, for example, size of employer establishment, worker age/cohort, and atypical employment. It should be noted, however, that foreign-born workers tend to populate smaller establishments, holding atypical employment; thus, there is a correlation between these factors and the unionization of foreign-born workers.

Concerning the propensity to join a union, Palm finds strong support for the effect of instrumentality, for instance the perceived benefits of membership. This may be seen as support for explanations (2), (3), and (4) suggested by Kjellberg above. It also lends support to explanation (5), institutional factors, which can affect both overall union density and an individual person’s decision about whether to join a union. The literature review also indicates that social pressures and pro/anti-union attitudes can affect the propensity to unionize and that these factors vary considerably depending on workplace, sector, and union. Palm further finds support in the literature for the effect of “charismatic leaders that arise from within a group” on participation and involvement in unions (Palm, 2017, p. 44).<sup>10</sup> Granted, this does not necessarily apply to the propensity to *join* a union, but it does suggest that *who* represents unions and *how* the problems that workers face are framed may at least be a part of the complex explanation of declining unionization among the foreign-born. This is also raised by Neergaard (2018), who maintains that unions have not sufficiently addressed the specific problems of foreign-born members in the way they have regarding, for instance, women’s rights. For example, there is a striking lack of union representatives with non-European background (especially in leadership positions), especially given the large share of members with this background in many blue-collar unions, while there is no such

<sup>10</sup>Although it should be noted that Palm’s (2017) conclusion is based on research that considers social or workplace identity, rather than ethnicity (Kelly & Kelly, 1994; Metochi, 2002; Cregan et al., 2009).

discrepancy when it comes to women. Further, Neergaard argues that the Swedish union movement's engagement in women's issues is often framed as "feminist unionism" (e.g., equal pay), while migrant workers' concerns are addressed as socioeconomic and class-related, rather than in terms of race and ethnicity.

An interesting study on the drivers of union membership in Sweden is Calmfors et al. (2021). Based on a questionnaire answered by 3000 union members and non-members, the authors find that few structural factors predict union affiliation. The only clear effects relate to age (old more than young) and sector (public more than private). As for foreign background,<sup>11</sup> it does not explain differences in unionization after controlling for other structural factors. In other words, workers who are comparable in terms of age, gender, sector, class (blue- or white-collar occupation), place of residence, and form of employment, have roughly the same likelihood of being union members whether they are foreign-born or not. It should be noted, of course, that these results only control for observable and included factors, but the overall conclusions are supported by other research discussed in this chapter (Palm, 2017; Cools et al., 2021). The study also finds that social norms (if one has colleagues, friends, and relatives who are union members, and if one's employer has a positive attitude toward unions) matter, especially for employees with foreign background. The same is true for instrumental factors (e.g., if one thinks that union membership can offer benefits in or outside of the workplace), which are associated with higher unionization for workers with a foreign background. Further, the study finds that accessibility and contact (e.g., not having been asked to join, not having received information) are more important explanations for the low unionization of young workers and those with foreign background than for others, which at least partly seems to support Neergaard's (2018) view that unions should pay more specific attention to foreign-born workers.

For the purposes of this chapter, a key question is whether a worker's origin in and of *itself* determines the likelihood of union affiliation. In light of the evidence discussed so far, we can conclude that it might, to some extent, but considerably less than other correlated factors, for instance income, sector, form of employment, age, or level of education. This conclusion is also supported by a study using Norwegian data (Cools

<sup>11</sup> In the study they are defined as foreign-born or born in Sweden with two foreign-born parents.

et al., 2021). Using a population-wide administrative dataset spanning 1997 through 2013, the study examines why immigrants are less likely to unionize than natives in Norway. The authors find that the gap in unionization between natives and immigrants is reduced significantly over time, as the latter become more unionized, although it never closes completely. This is true regardless of the reason for immigration (asylum, family ties, or work). Moreover, half of the gap is accounted for by variables describing labor market sorting, that is, the fact that foreign-born workers populate less unionized firms and sectors. Controlling for other variables (e.g., education, job experience, age) reduces the gap to one third of its original size (and almost the entire gap for second-generation immigrants). The most important factor, by far, is a firm's unionization rate, which accounts for between half and two-thirds of the unionization gap between immigrants and natives in the study. Second most important is seniority, which affects unionization considerably over time. In other words, migrants are much more likely to unionize (as are natives) if they work in highly unionized firms or sectors, and the longer they have been employed. Similar controls account for the differences between migrants from different countries and the authors find almost no evidence that immigrants from more unionized countries are more likely to join a union, when controlling for the aforementioned factors. The authors conclude that the difference in unionization does not have cultural explanations to any sizeable extent but is rather explained by labor market sorting. In addition, another study using Norwegian data shows that the increasing share of migrant workers has had no effect on native workers' willingness to unionize (Finseraas et al., 2020). Arguably, these findings can at least partly be assumed to hold for Sweden as well, since Norway is a country with relatively similar institutional and cultural features. Although Sweden has considerably higher union density and there are other differences related to the workforce, the economy, and labor market institutions, Norway is certainly a relevant country to compare with.

## INSTITUTIONAL AND POLITICAL TENSIONS RELATED TO MIGRATION

### *Union Density and Collective Bargaining Coverage*

The Swedish labor market model has moved from its strong corporatist roots to what is known in the industrial relations literature as an “organized decentralized” collective bargaining system (Traxler, 1995; OECD, 2019). While it still exhibits corporatist traits (e.g., tripartite concentration in labor legislation and training policies), the model is now less centralized than it was up to the mid-1980s, when bargaining was carried out by organizations at the central level. Today, unions and employers or employer associations at the local and sectoral levels have more scope to bargain for wages and other conditions in collective bargaining agreements. Further, the so-called Swedish Model rests on voluntarism and limited state intervention. It presumes that strong labor and employer organizations can represent workers and firms, self-regulating issues pertaining to the labor market and working life through collective agreements rather than legislation (Finansdepartementet, 2017; Kjellberg, 2019b). For instance, Sweden does not have a statutory minimum wage<sup>12</sup> and wide-ranging deviations from labor law (e.g., on working time or employment protection) can be made if unions and employers agree to do so through collective agreements. Therefore, high collective bargaining coverage is fundamental for the system to work as intended, otherwise increased state intervention through legislation would become necessary. State intervention is generally seen as anathema to the Swedish labor market model, which is widely supported by all key stakeholders, namely unions, employer associations, and the state.

Importantly, while union density has fallen, the same is not true for collective bargaining coverage. In Sweden, all employees at firms bound by collective agreements are covered, whether they are union members or not. Firms can either sign a collective agreement on their own or (more commonly) through membership in an employer association that negotiates agreements with its union counterparts at the sectoral level. Collective

<sup>12</sup>This is true at the time of writing but may have changed by the time this book is published, given the new EU Directive on adequate minimum wages that is being prepared. At the moment, the vast majority of Swedish wages are determined through collective bargaining at the sectoral level between employer associations and trade unions, and at the local level through bargaining between employers and unions or individual employees.



bargaining coverage in the private sector is approximately 85 percent; in the public sector it is 100 percent. This amounts to an average collective bargaining coverage rate of 90 percent, which has been more or less stable since 2006, while the overall union density has fallen from 77 to 70 percent. Hence, collective bargaining is, to some degree, upheld by the high level of organization among employers, who still seem to favor signing agreements (Calmfors et al., 2019; Kjellberg, 2022b). Thus, an obvious concern is that the ongoing decline in union density will threaten collective bargaining coverage in the long run, as employers have fewer union counterparts to bargain with and as they also become less fearful of industrial action from weakened unions. As mentioned, there are large variations between sectors both in terms of collective bargaining coverage and union density. Foreign-born workers are overrepresented in sectors with lower levels of both. In other words, the parallel trends of declining union affiliation and growing share of the foreign-born workforce constitute a potential threat to the Swedish labor market model in the long run. If organized labor is weakened enough such that collective bargaining coverage drops significantly, legislation may have to be extended to more areas, thus reducing derogation and shifting power from the social partners (employers and unions) to the state, for example politicians. Another risk is that, even if the state would abstain from involvement and allow social partners to self-regulate, collective agreements would become increasingly weaker and devoid of material content, as union strength is reduced by declining membership numbers.

The long-term threat to the labor market model posed by declining union density among migrants (as well as other groups) is of great concern to all stakeholders, especially trade unions. If union density drops significantly in certain sectors, for instance those where migrants are overrepresented, workers' bargaining power can suffer, especially if collective bargaining coverage declines as a consequence. This can undercut wages and other conditions for workers in those sectors, thus threatening the capacity of unions to safeguard and advance the interests of their members. If unions become less effective and influential, union affiliation may become less attractive, especially as membership fees are relatively more burdensome for workers in low-pay professions with fixed-term and/or part-time contracts (because, in general, blue-collar unions have higher fees and their members earn less). This type of vicious circle is already proving difficult to break in certain sectors, like transportation, restaurants, and hospitality (Kjellberg, 2019a). White-collar unions are also

affected by migration, although the unionization gap between migrants and natives is not as large in white-collar unions and the share of migrant workers is smaller. As for labor migration, white-collar unions were largely in favor of the liberalized legislation ushered in 2008, whereas the blue-collar unions were ambivalent and critical, as they believed it would lead to the undercutting of wages, occupational safety, and employment conditions in their sectors (Marino et al., 2017; Neergaard & Woolfson, 2017; Afonso et al., 2020).

In summary, changes in union density can have significant institutional effects for industrial relations systems. Although unionization in Sweden is among the highest in the world, it has declined almost 20 percent since the early 1990s, and almost 10 percent between 2006 and 2021. As yet, the institutional framework underpinning the Swedish labor market model has not been affected to the same effect. Not only has there been some organizational consolidation on both the labor and employer sides but also labor law has gone through some non-trivial changes with regard to labor migration and the aforementioned relaxation of employment protection. However, most relevant legislation, as well as the main public and legal authorities and industrial relation structures, remain largely the same.<sup>13</sup> Collective bargaining coverage remains unchanged at about 90 percent, partly upheld by the high levels of affiliation to employer associations (affiliated employers are automatically bound to collective agreements). Finally, wage formation, one of the most important functions of an industrial relations system, has been coordinated in much the same way since the turn of the millennium (Kjellberg, 2019b; Bender, 2021).

Nevertheless, the importance of union density should not be underestimated and there are warnings about the possible effects that the negative trend may have on Sweden's political economy, as power relations tilt to the employers (Calmfors et al., 2019; Kjellberg, 2019a). As the labor market is a central element in Sweden's broader social model, institutional changes in the industrial relations system can have economy-wide effects in areas such as social policy, macroeconomic policy, education policy, and migration policy. Of course, unions are aware of this, as their high

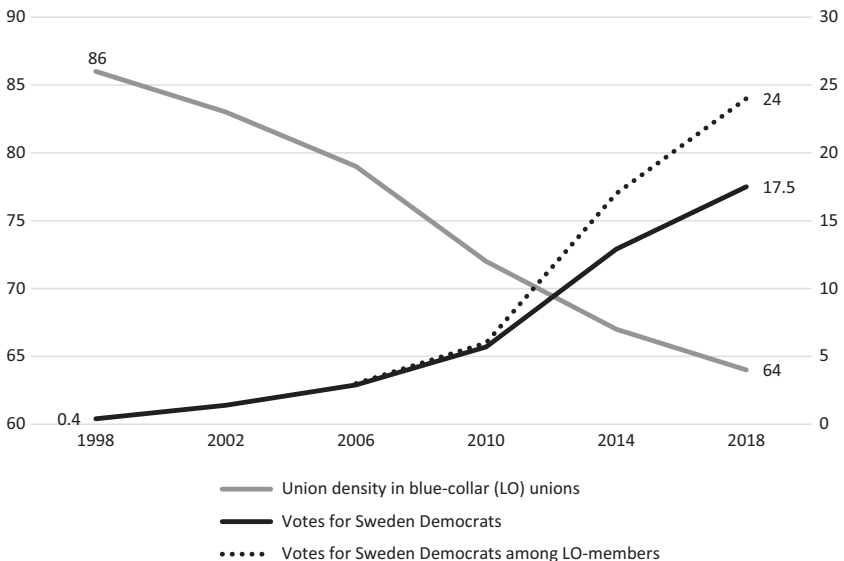
<sup>13</sup>This is not to say that they will remain so. As mentioned in a previous footnote, the potential impact of the EU Directive on adequate minimum wages is, as yet, unclear, and there are other ongoing EU initiatives that could potentially affect Swedish industrial relations, such as the Directive on equal pay and pay transparency, and the Directive on improving working conditions in platform work.

membership numbers and union density give them not only bargaining power but also political influence.

### *Changes in the Political Landscape*

Another development impossible to ignore in the context of migration is the rise of the Sweden Democrats, a populist radical right-wing party that managed to get its first parliament seats in 2010 on an anti-immigration agenda. The party has grown rapidly since, especially among blue-collar workers, while union density in the same group has declined substantially (Fig. 8.6).

These parallel developments are a major concern for the blue-collar confederation LO and its member unions, for at least four reasons. First, internal tensions will likely arise when a large minority of the members (mostly Swedish-born men) support a radical right-wing party that



**Fig. 8.6** Union density and electoral support for the Sweden Democrats among blue-collar workers and the general population, 1998–2021\* (percent). *Sources:* Holmberg et al. (2020) and Kjellberg (2022b). \* The Sweden Democrats entered parliament in 2010

opposes the interests of another large minority (migrant workers) (Neergaard, 2018). Second, LO is affiliated with the Social Democrats in numerous ways, including financially and with seats in the party leadership, as are some of its member unions. This is difficult to accept for some workers who sympathize with other political parties (Calmfors et al., 2021) and may explain at least part of the decline in both union density and membership numbers.<sup>14</sup> Third, there have been (so far unsuccessful) attempts by representatives of the Sweden Democrats to gain elected positions in blue-collar unions, thus influencing these organizations' political priorities. Given that the Sweden Democrats usually side with the conservative parties in parliament (and also pledged their support to a conservative government after the 2022 election), whose policies are generally not favorable to the labor movement, this can be seen as a form of infiltration to undermine organized labor from within. Fourth, a considerable share of the Sweden Democrats' growth since 2010 comes from previously Social Democratic voters, which has caused a major structural shift in Swedish politics and undermined any prospects of a Social Democratic majority, or even a dominant center-left coalition. This is a blow to blue-collar unions, both because their political influence largely rests on their connection to the Social Democrats (whose political dominance has been weakened considerably, perhaps permanently) and because they strongly oppose any government that does not include the Social Democrats.

Of course, these consequences can also be detrimental to refugees and labor migrants. Weakened unions can affect working conditions in blue-collar and precarious jobs, where migrant workers are overrepresented. The loss of LO members and Social Democratic voters who sympathize with the Sweden Democrats might cause blue-collar unions and the Social Democrats to adopt anti-immigrant policies that appeal to the members and voters they risk losing. If the Sweden Democrats succeed in getting elected to union positions, this may also spur anti-immigrant policies in the union movement (in the past few years, the party has been calling for negative net migration).

<sup>14</sup> White-collar unions are not affiliated to any political party. Although they too have seen an increasing share of Sweden Democrat voters among their members (albeit considerably lower than for blue-collar unions), this poses a different type of problem for those unions.

## UNION CHALLENGES AND RESPONSES TO MIGRATION

*Challenges for Trade Unions*

The challenges facing trade unions due to increased immigration are not uniform across unions in the same country, even less so across countries with different levels and types of immigration, different job structures, and varieties of institutional settings (e.g., industrial relations systems and welfare regimes). Based on the research discussed in this chapter, the following broad challenges for trade unions, particularly in Sweden, can be identified.

1. *Precarious labor market conditions among migrants.* Lower employment levels, higher unemployment, low salaries, and various forms of irregular employment are all more common among foreign-born workers than among natives. A weak labor market is generally seen as detrimental to union power, because if there are no or few alternatives, workers are less likely to oppose employer decisions or turn down job offers with low pay and bad employment conditions. Furthermore, precarious conditions and high unemployment in sectors with low collective bargaining coverage can induce a race to the bottom, where employers take advantage of the most vulnerable workers to undercut pay and conditions for other workers. As previously discussed, those sectors with higher levels of unemployment and precarious work are precisely those sectors where union density is low and migrants are overrepresented. Moreover, higher unemployment, especially of the long-term kind that is more prevalent among migrants, also reduces the membership base and, hence, unless union density is increased, the income from membership fees that finances most union activities.
2. *Low union density among migrants.* Recruiting migrant workers can be difficult and costly, as migrants are overrepresented in sectors with smaller workplaces (demanding more resources to organize), in sectors with more part-time and fixed-term work (and therefore hard to reach), and in sectors with low levels of unionization and collective bargaining coverage (with low union presence and non-cooperative employers). To some extent—although these seem to be less important factors, according to empirical studies—not only must unions overcome a lack of knowledge about the labor market among migrants, a lack of union traditions, and suspicion toward unions in some migrant groups, they

must also overcome prejudice and apprehension toward migrants among their own members and employees.

3. *Growing disparities between natives and foreign-born workers.* Divergence in for example unemployment, union affiliation, wages, and employment conditions between migrant and native workers cause a number of problems for unions, especially those organizing blue-collar workers. Union strategies rely on cohesion and unity among members, as well as on organizing as many workers as possible in a particular sector or membership category. When conditions diverge between groups, cohesion becomes more difficult and more workers fall outside the scope of unions. Another problem is that these divergences have increasingly become associated with growing support for the radical right, creating political and organizational problems for blue-collar unions in particular.

Broadly, then, the main challenges migration poses for unions stem from the low employment rate, the low union density among migrants, and from political developments (e.g., the opposed examples of liberalized labor migration and anti-immigrant sentiment among voters and political parties). Therefore, policies that promote economic growth, job growth, and improve employment conditions are essential to address these challenges, as are, of course, inclusion and anti-discrimination measures. Further, since research indicates that foreign-born workers exhibit unionization patterns similar to those of natives (when controlling for relevant factors), policies that promote union density in aggregate, but also for specific groups, are important and are typically preferred by Swedish unions.

At this point, it is pertinent to ponder the potential effects of the Covid-19 pandemic on the challenges listed above. Firstly, we can observe that an immediate effect of the pandemic has been a slight increase in union density, both for natives and foreign-born workers. Although the increase so far has been modest both at the aggregate level and for subgroups,<sup>15</sup> it marks a change from the negative trend of the past three decades. Of course, it is difficult to say if this is the beginning of a positive

<sup>15</sup> Between 2019 and 2021, aggregate union density increased from 68 to 70 percent. This reflected an increase from 60 to 62 percent for blue-collar workers, and from 72 to 74 percent for white-collar workers. Union density for *foreign-born* blue-collar workers increased from 51 to 54 percent, and for *foreign-born* white-collar workers it increased from 65 to 66 percent.

trend, a new equilibrium, or if the long-term negative trend will continue. As mentioned, the pandemic also resulted in an increase of approximately 29 percent in long-term unemployment (more than 12 months), amounting to almost 180,000 people, of which about 60 percent are foreign-born (Arbetsförmedlingen, 2021, 2022). In the current high inflationary environment, which has been met by tightening monetary policies, some employment forecasts point to rising unemployment during 2023 and 2024.

These conditions may make it more difficult to increase union density, but that is contingent on other factors like unemployment insurance and social benefits, and the duration of the downturn in the labor market. During the pandemic and the financial crisis of the early 1990s, union density in Sweden increased partly due to fear of rising unemployment among workers, and partly to generous changes in unemployment insurance. In contrast, the financial crisis of 2008 had the opposite effect of drastically decreasing union membership numbers, due to political reforms that reduced unemployment benefits and other forms of social protection, while rising the unemployment insurance fees. A critical challenge for policy makers in post-pandemic Sweden will be to reduce the gap between native and foreign-born blue-collar workers, especially regarding long-term unemployment, but also regarding overall unemployment and precarious employment conditions. For unions, the challenge will be to find (perhaps new) ways of reaching and organizing foreign-born workers.

### *Varieties and Logics of Union Responses*

Given the serious problems that declining union density among foreign-born workers entails for the Swedish industrial relations system and, in particular, for unions, it is surprising how little the issue has been addressed by trade unions, both rhetorically and in actual measures. It would not be possible to offer a detailed overview of union responses to migration in this chapter. However, drawing on previous research, we can attempt to categorize various types of responses by Swedish unions to the challenges posed by migration. The logics behind these responses are then discussed, employing a theoretical model proposed by Connolly et al. (2014). The following responses can be summarized as the most common found among Swedish (and many other) trade union organizations.

1. *Recruitment.* Unions constantly work with recruitment, especially in sectors with large turnover (e.g., hospitality, healthcare, transportation, retail), which are sectors where foreign-born workers are overrepresented. There is also an awareness of the relatively larger decline in union density among foreign-born workers, the underrepresentation of foreign-born union members relative to their share of the workforce in some sectors, and the problems this may entail as their share of the workforce grows (Calmfors et al., 2021; Kjellberg, 2022a). However, targeted measures that are specifically tailored to foreign-born workers, apart from information in various languages available on some union websites and in interpreters to communicate with migrants, are rare.
2. *Advocacy and bargaining.* Unions traditionally advocate (i.e., lobby) in the interest of their members, in order to affect for instance labor law or policies concerning education, welfare, and taxes. Further, they negotiate with employers through collective bargaining on issues pertaining more specifically to their members' working conditions and wages. In both cases, Swedish unions are traditionally motivated by economic and material (i.e., class-related) issues, for example, wage levels, types of employment, working hours, and pension benefits among workers (Augustsson & Holmgren, 2001). Less often, unions are motivated by cultural or identity factors, except in the case of women, where there is a long tradition of gender-based union demands and activities (so-called feminist unionism). There are also specific examples of activities since 2015 worth mentioning. For instance, the white-collar union Akavia has a mentorship program for foreign-born academics and the municipal blue-collar union Kommunal also has some targeted activities (Calmfors et al., 2021). Three major union and employer organizations—LO, Unionen (the main white-collar union), and Svenskt Näringsliv (Confederation of Swedish Enterprise)—have reached an agreement with the state on so-called establishing jobs (*etableringsjobb*) for newly arrived and long-term unemployed, which will allow for lower wages and a combination of part-time work and education or training, including Swedish language studies (Arbetsmarknadsdepartementet, 2019). Additionally, as mentioned, blue-collar unions have long advocated for more regulated labor migration, while white-collar unions have attempted to preserve the current liberal regime with only minor adjustments. Overall, however, labor market issues related to migrant workers (e.g., unemployment, low wages, and irregular employment) are not treated differently by unions



than those same issues for other workers and ethnically motivated strategies are avoided (Mulinari & Neergaard, 2004; de los Reyes, 2008; Neergaard, 2018). A particular political strategy worth mentioning here is that most unions have publicly declared that they will not have any direct contact with the Sweden Democrats, which is not the case for any other political party.

3. *Support to non-organized and irregular migrants.* The most salient example here is Fackligt center för papperslösa (Union Center for the Undocumented), a jointly financed cross-collar<sup>16</sup> office that provides legal advice and support on labor-related issues to undocumented immigrants.
4. *Representation.* The three main forms of representation in this context are (a) membership; (b) elected positions (e.g., shop stewards or union board members); and (c) career positions (i.e., union employees). We have already discussed (a) with regard to recruitment. As for (b) and (c), there are no quantitative studies on the ethnic background of union employees and elected officials, but from my own experience working in union organizations for almost 15 years and drawing on several case studies, it seems clear that most unions have not been able to mirror the diversity among their own members and even less among workers in their industries (Augustsson & Holmgren, 2001; Mulinari & Neergaard, 2004; de los Reyes, 2008; Bengtsson, 2013; Neergaard, 2018). Put simply, while the Swedish workforce has changed drastically since the 1980s, unions are still predominantly white organizations, both in terms of elected officials and employed staff.

In summary, Swedish unions have largely opted for what Connolly et al. (2019, p. 84) label “default-inclusion strategies,” as illustrated by the introductory quote to this chapter. These strategies are neither separatist nor specifically tailored for migrant groups but aim to organize foreign-born workers as members of the broader worker collective. Similarly, drawing on Penninx and Roosblad’s (2000) typology of union responses to migration, Bengtsson (2013) finds that organizing migrant workers as members is the main strategy among Swedish unions (three blue-collar unions were studied), instead of opposing migration, demanding quotas, or including them into union ranks as elected officials or employees. Other scholars present similar findings on Swedish unions’ main response to

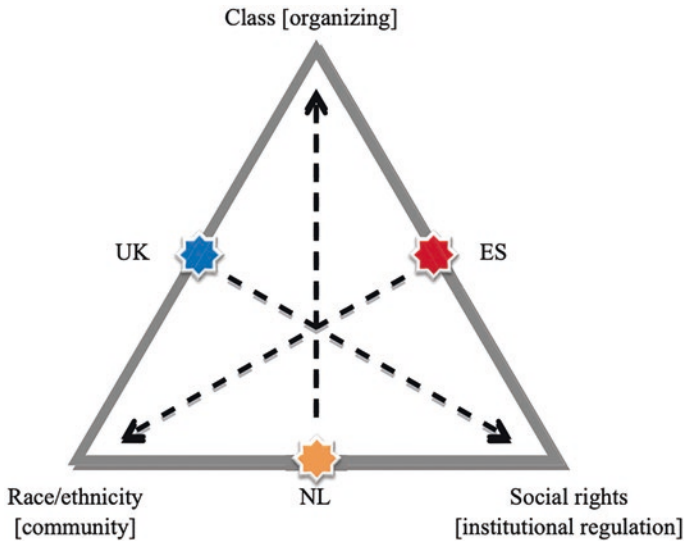
<sup>16</sup> Both blue- and white-collar unions.

migration; for instance, Afonso et al. (2020) and Boräng et al. (2020) refer to an “equalization strategy,” and Marino et al. (2017) describe it as “inclusion” and “equal treatment.” Hence, Swedish unions promote the interests of foreign-born workers as they do for all other workers, namely through organizing, class- or profession-based policy development and advocacy, as well as collective bargaining on issues pertaining to economic and work-related issues. This is preferred to strategies that focus on culture or ethnicity, for instance setting up separate institutional structures or regulation.

It should be mentioned that some scholars are critical of this strategy. Neergaard and Woolfson (2017, p. 216) call it “subordinated inclusion,” in which “the central dynamic is to organise, but without particular practices of representation or giving voice.” According to Marino et al. (2017, pp. 361–362), this practice “indicates a formal inclusive approach that does not address the disadvantages of migrant workers in the labour market,” and “implies that representation is provided if the interests of migrant members coincide with the interests of native workers, but on the latter’s terms.” In other words, to the extent that migrant workers are categorized as *workers*, they are included in the Swedish trade union movement’s striving for equal treatment and decent working conditions that comply with labor law and collective agreements, according to these authors. However, those specific aspects pertaining to migrant workers as *ethnically* or *culturally* different from the majority population are generally not taken into account in union strategies, resulting in a “‘colour-blind’ approach” (Marino et al., 2017, p. 378).

The “default-inclusion strategy” proposed by Connolly et al. (2019) can be placed into a theoretical model for categorizing union logics and modes of action, developed by the same authors in an earlier paper (Connolly et al., 2014). The model is represented by a triangle (Fig. 8.7), which illustrates three overarching logics that inform trade union activities. The authors argue that unions in the three countries they study prioritize certain logics over others. Specifically, they place the UK on the left-hand side, Spain on the right-hand side and the Netherlands at the base of the triangle (for further analyses of France, Italy, and Spain, see Chap. 7 in this volume, by the same authors).

My overall assessment is that the Swedish union movement should be placed on the right-hand side of the triangle: it is motivated by class and social rights, with its actions revolving around organizing and institutional



**Fig. 8.7** Trade union logics and modes of action. *Source:* Connolly et al. (2014, p. 8 (reproduced with permission from the authors and in accordance with the STM Guidelines)

regulation. This is the main strategy favored by Swedish unions, albeit not very successfully, as shown in the first sections of this chapter.

The authors further suggest that the model can be used analytically, not only descriptively, in the sense that the missing logic (the opposite corner in the triangle) can be seen as a particular union movement's (or a specific union's) "weak point," that is, "the union's position along one of the dimension of the triangle implies that the opposite pole is the challenge (the gap) that the union have to face" (Connolly et al., 2014, p. 16) with regard to migration. So, for instance, the authors argue, the Spanish trade union movement is characterized by the two logics of class and social rights, and thus lacking in the opposite dimension, namely issues related to race and ethnicity. However, the research reviewed in this chapter does not necessarily support this claim. While it is true that Swedish unions are not generally motivated by race or ethnicity, and that community building (based on these traits) is not a priority for their actions, it is not clear that it is a weakness in terms of achieving their aims and addressing migration-related challenges. As discussed, most studies indicate that organizing and

institutional regulation seem to be more effective ways of increasing unionization among migrant workers. In other words, the default-inclusion strategy employed by Swedish unions seems to be in line with the research reviewed in this chapter (Palm, 2017; Calmfors et al., 2021; Cools et al., 2021; Kjellberg, 2022a), which indicates that, if unions wish to reduce the unionization gap between migrant and native workers, they (and policy makers) should focus on addressing institutional (e.g., labor law, unionization rates, social policy) and structural (e.g., age, job experience, firm size) factors instead of cultural differences.

Nevertheless, there is certainly scope for improvement along the “weaker” dimension and the ethnicity/community logic does present an untapped opportunity that Swedish unions could explore. We should also note that studies have not assessed counterfactual scenarios; for instance, what would have happened if unions *had abstained* from some specific measure or how strategies that unions *did not* employ would have affected unionization. Moreover, we know very little about how unionization in Sweden is affected by measures that take cultural factors into account, for instance better representation among union staff and elected officials, anti-racist messaging, communication in different languages, or suborganizations (like immigrant sections). In other words, measures specially tailored to foreign-born workers should certainly not be written off, but extant research does indicate that unions and policy makers should perhaps focus more on measures that contribute to better employment conditions and wages and, thusly, to higher unionization overall, as well as on instrumental factors (e.g., membership fees and benefits) that improve the cost-benefit calculation for low-wage and precarious workers.

## CONCLUSIONS

The share of migrant workers (refugees, labor migrants) in the Swedish workforce has increased considerably since the 1980s and is expected to increase further (this was true even before the massive migration caused by the war in Ukraine). Simultaneously, union density has dropped sharply, especially among foreign-born workers. As migrant workers continue to grow as a share of the total workforce, there is an evident risk that these structural trends will further suppress both membership numbers and union density, thus weakening one of the union movement’s most important power resources (Korpi, 2006). Another crucial power resource, political influence, is also in decline, as voter support for the radical right

increases among blue-collar workers, whose labor unions are (still) affiliated to the Social Democrats.

In the face of increasing migration and political tensions, Swedish unions have opted for an equalization and organization strategy, which focuses on improving work-related and material rights for all union members, regardless of background, and on social rights. It is a strategy that puts less emphasis on aspects related to race, ethnicity, or religion, for instance by demanding special rights for some immigrant groups, arranging separatist organizational structures, or offering targeted recruitment and support activities (although, of course, there are occasional examples of the opposite).

This “color blind” strategy (Marino et al., 2017) has some support in the literature, which finds little evidence that the low union density among foreign-born workers can be explained by their ethnicity or religion, rather than with their labor market position (e.g., private service sector, part-time and fixed-term contracts, and other forms of precarious employment). However, although the strategy is broadly in line with extant research, it does not seem to have worked particularly well, as union density in Sweden (and elsewhere) has continued to drop, especially among immigrants. Possible explanations for this are that unions have not managed to stop or mitigate institutional changes (deregulations in labor and migration law, reforms in labor market and educational policies, and hollowing out of unemployment and social benefits) that have been detrimental to unionization. The weakening of unions has then made it more difficult to mobilize the resources necessary to organize migrant workers to the same extent as natives.

Moreover, scholars argue that these “default-inclusion strategies” (Connolly et al., 2019) can be seen as a form of “subordinated inclusion” (Neergaard & Woolfson, 2017), in which the conditions and priorities are largely set by the majority population, in other words, Swedish-born workers. This may, to some extent, explain difficulties in unionizing foreign-born workers, although the literature indicates that structural and institutional factors (e.g., low pay, precarious working conditions, labor law, and immigration law) are probably more important explanations. It should be noted that most Swedish unions, especially blue-collar ones, do have significant shares of foreign-born members, but still they have not been able to match the increased share of foreign-born workers among employees in their sectors. Additionally, they have been even less

successful in doing so among their own employees and elected officials, who are still predominantly Swedish-born.

It should be said that these long-term trends may be changing, as union density increased somewhat during the Covid-19 pandemic, most notably among foreign-born workers. But, for the encouraging signs in union affiliation to translate into a positive trend, a necessary condition will arguably be to substantially reduce both long-term and overall unemployment among foreign-born workers, and to improve employment conditions in industries where many foreign-born workers are found, including hospitality, retail, transportation, and the municipal sector. Given the Swedish industrial relations system's reliance on high levels of employment, union density and collective bargaining coverage, the entrenched and growing divide between Swedish- and foreign-born workers—both in terms of employment conditions and unionization—is a serious threat to the celebrated Swedish labor market model.

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# Unemployed Marginalised Immigrant Women: Work Integrating Social Enterprises as a Possible Solution

*Sophie Nachemson-Ekwall* 

## INTRODUCTION

Labour market employment is a central pillar in the creation of a socially inclusive EU, where low unemployment goes hand-in-hand with citizens' democratic involvement in society (Hedin et al., 2015). However, challenges are manifold. Since the 1970s and 1980s, European labour policy has shifted from actively assuring the availability of employment for “everyone” (Spear et al., 2001) to the individual’s responsibility for ensuring one’s own employability (Peck, 1996). This is especially demanding for unemployed individuals who, for a variety of reasons, lack competences that easily match labour market demands.

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Here I focus on one such marginalised group in the labour market: lower educated and local language weak immigrant women. Besides lacking basic skills related to even limited technical proficiency, formal training, and interpersonal skills (Kazlou & Wennberg, 2023), employers and labour agencies encounter a culturally and ethnically diverse group with socio-economic poverty and a general feeling of exclusion (Liebig & Tronstad, 2018; Kraff & Jernsand, 2021). Thus, job creation for marginalised immigrant women can be seen as a societal challenge with multiple and contradictory underlying reasons, a so-called wicked problem (Churchman, 1967; Nicholls et al., 2015). There is also a real risk that this group of women will be further marginalised. Even before the Covid-19 pandemic and Russia's invasion of Ukraine, refugee immigration was expected to grow (Massey, 2020), further augmenting the challenges facing European Commission President Ursula von der Leyen's goal for a green transition "where no one is left behind" (von der Leyen, 2020).

Sweden is especially exposed to this wicked problem, having seen a large proportional influx of immigrants since the 1990s. As a Nordic welfare state, the public labour policy programme expects, and is dependent on, high labour market involvement. Additionally, the Swedish labour market is both skewed towards more highly skilled workers and has among the highest employment participation of women in the EU.

One way to handle a complex challenge like this is to open the job market for experimentation with new ideas. Here I explore one such solution, the so-called work integrating social enterprises (henceforth WISE). Often structured as cooperatives, WISE focus on democratic involvement (Pestoff, 2012; Pestoff & Hulgard, 2016). They belong to a new and growing category of businesses, social enterprises, that have both economic and social goals in common. Many focus on work integration, often combining public financing and market-based income, thus pursuing a hybrid business model (Defourny & Nyssens, 2008; Defourny et al., 2014; Borzaga et al., 2020). European social enterprises come in a variety of associational forms and there is no standard definition. They often belong to civil society or the so-called third sector, organised as non-profits and cooperatives with social goals but can also be for-profit companies or foundation-owned companies. Research describes WISE, with their special feature of democratic involvement, as a viable tool related to empowerment, inclusion and economic mobility for excluded and marginalised groups in the labour market (Levander, 2016; Lundgaard Andersen et al., 2016).

However, the societal support for WISE or other third-sector social enterprises offering work integration is limited (Lundström & Wijkström, 1997; Defourny et al., 2014). Research describes the commitment from policy-setters, public sector actors, private sector actors, politicians, financial institutions and regulators as contradictory, unpredictable and varying across European countries (Nicholls et al., 2015; Borzaga et al., 2020). Sweden is often described as harbouring a particularly difficult and complicated institutional climate for WISE to exist in (Gawell, 2019).

In this research, I explore why WISE have not yet succeeded as an instrument for Swedish labour integration. Given continuous high political ambitions for job creation for unemployed, local language weak, immigrant women, one might also argue that WISE should get another chance to show their capabilities.

The research is embedded in the existing literature on social enterprises and WISE, public documentation of Swedish social enterprises and literature on the Swedish institutional context. It comprises 23 semi-structured interviews, carried out between October 2021 and January 2022; four interviews with representatives of municipalities; 13 with representatives of seven different WISE organisations; three with representatives from networks of WISE and social enterprises offering labour integration; two with representatives of public agencies; and one with an academic researcher. The WISE were chosen from a list of WISE mentioned in existing literature, news articles and conferences, which were then asked to name women-inclusive WISE, of which seven were chosen as illustrative empirical examples.

New institutional theory (Meyer & Rowan, 1977; Scott, 2008) is used as a lens to view and analyse the empirical data. This allows me to structure and categorise the central components needed to develop markets, for instance, regulations, norms and expectations in society. The market referred to is the market for work integration of marginalised groups in the labour market. In this market, WISE take a collaborative position between the private for-profit sector and the tax-financed public sector (Defourny et al., 2014). As such, WISE can be characterised as an institutional change agent, its hybrid and complex organisational structure not fitting into the current order (Suddaby & Greenwood, 2005; Pache & Santos, 2012). The concept of legitimacy stands at the centre of this discussion, here defined as a change agent's ability to develop a collaborative relationship between the organisation and its audience in a way that fits with the norms and expectations in society (Suchman, 1995).

My exploration indicates that a more resilient labour policy may be emerging, one that opens new opportunities for both Swedish WISE and marginalised immigrant women. I find emerging support structures in three areas: (1) public and private sectors' increased commitment to empower and promote inclusion of all (e.g. Sustainable Development Goal 10.2, UN, 2022); (2) the development of collaborative networks with other WISE; and (3) the work to deploy resources to enable systematic use of social impact metrics. The Swedish experience, here summed up as a legitimisation process in three phases, can thus serve as an illustration of the ability for WISE to survive and adapt, despite a particularly harsh climate for WISE's hybrid structure (Laurelii et al., 2014; Gawell, 2019).

The sections that follow start with a background of the changing labour market and the special situation for unemployed, low-skilled immigrant women and the role WISE can play. The third section covers the institutional context. This is followed by the section Examples and Results with the empirical data and findings to show how WISE works. Analysis and conclusions are presented in final section.

## BACKGROUND

### *The Labour Market for the Less Skilled Women in Sweden*

In 2018, the employment rate for women (aged between 20–64) in the European Union (EU) stood at 67% (Eurostat, 2022). Among EU member states, Sweden had the highest employment rate for women (80%), whereas Greece (49%) and Italy (53%) reported the lowest rates. The large overall participation of women in the labour force reveals a gap between native and foreign-born, with Sweden showing the largest gap among the EU member states (Eurostat, 2022). Overall, 85% of Swedish-born women work compared to 80% of EU-born and 55% of non-EU-born.

However, statistics are always nuanced. The employment statistics of many European countries include people in the workforce who cannot earn a living income, whereas they are categorised as unemployed in Sweden. Additionally, in many countries, people far from the labour market, defined by the EU as registered unemployed for longer than 12 months, are missing from the labour statistics.

Looking at Sweden, according to Arbetsförmedlingen (AF—Swedish Public Employment Service), in May 2022, there were 164,000 registered as openly unemployed for more than 12 months (AF, 2022). Of these

100,000 had been unemployed for over two years. Looking specifically at lower-educated foreign-born women (defined as below lower secondary school), in a separate report for AF a total of 118,000 unemployed women are noted, half of whom were born in the Middle East and Africa (Jansson, 2020). Various reports show the difficulties in addressing training programmes targeting this group. Measures specifically targeting lower-skilled women are extremely rare (Nordiska ministerrådet, 2018) and those sectors that are currently women dominated often require post-secondary education, which is not the case for male-dominated sectors (Frydebo & Kaufmann, 2019).

Civil servants at AF estimate that around 10,000 of these long-term unemployed foreign-born women are weak in the Swedish language. Further, lower educated immigrant women need personal coaching and tailor-made supervision in order to be able to adapt to labour market requirements. A 2018 report from Statskontoret (Swedish Agency for Public Management) describes the challenges encountered as both structural and individual, covering discrimination, parental insurance and the social security system, as well as cultural and ethnic heritage. Liebig and Tronstad (2018) note that many immigrant women do not come to the host country for work, but rather for family reunification and that these women often peak in child births in the year after arrival. An AF study shows that many of the unemployed women belong to the group of socio-economically weak women born in countries like Eritrea, Iraq, Somalia and Syria (Jansson, 2020).<sup>1</sup> This is also a societal problem, as many of these women are either on parental leave or single women with children who live in relative poverty. The group of older foreign-born women who are economically vulnerable is increasing. The problem is exacerbated by Swedish housing policy with socio-economically weak immigrant groups often stuck in overcrowded and segregated suburbs (e.g. Valdez, 2023, this volume), many also high crime areas. The overall conclusion from these reports is that targeted and differentiated interventions are needed for foreign-born women living in economic vulnerability.

<sup>1</sup> According to the EU definition, persons at risk of poverty are those living in a household with a disposable income per consumption unit after taxes below 60% of the median income in the country. In Sweden this amounts to 7% (Living Condition Survey, SCB, 2018).

### *The Emergence of WISE*

Since the 1970s, western societies have been faced with serious structural unemployment (Spear et al., 2001). In Sweden, the solution included the initiation of sheltered workshops, run by regions and municipalities. However, the workshops were criticised, especially from user organisations in the 1970s who felt that the workshops did not take enough consideration of the well-being of the unemployed (Hedin et al., 2015). The workshops were merged into a state-owned company, Samhall, in 1980, who in collaboration with AF would offer employment to disabled individuals. However, the critique remained (Riksdagen, 2021b; Torp, 2021).

In the 1990s, after having opened the domestic market for international trade and EU membership in 1995, Sweden also adapted its public labour policy from actively offering jobs to a more liberal market approach. The adaptation involved challenges in that the public sector began to downsize, making it difficult for the AF to offer public sector job opportunities to the lower-educated and, for other reasons, less skilled individuals. At the same time, Swedish industry's demand for lower-educated workers declined.

To address these challenges—alongside the critique of Samhall—the 1980s and 1990s also saw the welcoming of non-traditional solutions (by Swedish standards), leaving room for civil society, religious institutions and non-profit foundations to contribute by combining work and care for the socially vulnerable, who would otherwise be disadvantaged in the labour market (Stryjan & Wijkström, 2001). One such solution was work integrating social enterprises, the so-called WISE.

WISE originated in Italy after World War II and were introduced in Sweden during the late 1980s by staff and former patients in psychiatry and care. In 2022, Swedish WISE reach unemployed youth, disabled, recent immigrants and the group targeted here, low-skilled and local language weak women by Tillväxtverket (Swedish Agency for Economic and Regional Growth) in 2019 and by Sociala arbetskooperativens intresseorganisation (Skoopi—Swedish Association for WISE). Instead of offering subsidised jobs with limited supervision—as in the sheltered workshops—these cooperatives focus on workplace rehabilitation, where the individual is prepared for the labour market by developing the individual's own capabilities, with the aim of strengthening competences, self-esteem and empowerment. The jobs are often simple, low-skilled, tasks, such as work in second-hand stores, cleaning, dog walking, gardening and janitorial,



but can also require some skills, such as lighter industrial subcontracting work, cooking and sewing.

As there is neither an official definition of WISE as a legal form, nor a responsible association with resources allocated for the task, there are no exact figures on Swedish WISE. Reported numbers include both social enterprises focusing on work integration and WISE that are organised as social cooperatives with democratic involvement. However, Laurelii (2002) refers to estimates of around 45 WISE in Sweden in 1990s and that these grew to 90 by 2000. Gawell (2018) refers to public attempts to estimate the number of WISE by Tillväxtverket in 2012, landing at some 271 WISE, then in 2016 there were some 350 (and by 2018 some 343 organisations, with 3500 employed and another 9500 people participating in activities). According to informants at Skoopi, 25% of WISE had closed down in 2021, reflecting a reform of the AF that limited demand for the WISE offering (Sjögren, 2021).

Furthermore, 65% of the Tillväxtverket-registered social enterprises focusing on work integration use the economic association legal form (thus qualifying as pure WISE with democratic involvement), the rest are non-profit associations and foundations (Gawell, 2018). Approximately 75% of these entities employ fewer than 10 people. A study of 75 civil society efforts for work inclusion, of which some constitute WISE, find that non-Sweden-born individuals made up 36% of the participants (Lindberg et al., 2022).

## THE INSTITUTIONAL CONTEXT

Since the 1970s, WISE is seen as strong innovators of Western economic welfare services (Pestoff, 2012). As such, they belong to a group of social enterprises and entrepreneurship that can be characterised as institutional change agents (Defourny et al. 2014; Nicholls & Zeigler, 2019). They often develop collaborative processes (Sorensen & Torfing, 2015), are embedded in their local community (Stryjan, 2004), incorporate local opportunities and needs into their business model (Stryjan, 2004) and innovate in a way that blurs the boundaries between the three sectors: state, market and civil society (cf. Lundgaard Andersen et al. 2016). From a Swedish perspective, their presence constitutes a challenge to the current order with a large public sector, liberal free market private sector and then a civil society playing a marginal role squeezed between the other two and challenging the classic collective bargaining agreement between the

private sector and labour unions (Lundström & Wijkström, 1997; Pestoff & Hulgård, 2016; Nachemson-Ekwall, 2021).

Other distinctive features of WISE are the management's belief that the inclusion of participants attending their labour market integration activities in the overall operation of the enterprise results in transformed and empowered individuals (Pestoff & Hulgård 2016). The Ministry of Enterprise and Innovation (Näringsdepartementet) writes that WISE bring an improvement to the enterprise itself as the employees manage to produce a service or product that can be sold to the market (Regeringskansliet, 2010). According to Levander (2016), WISE serve as an educational instrument for democratisation, thus differing from, for instance, the state-controlled sheltered workshop Samhall, as Samhall's mission is limited to offering employment to the disabled.

In general, the public sector in European countries views civil society and WISE as legitimate partners as they ensure that taxpayer funds are directed towards work integration and spent for the benefit of citizens (Nicholls et al., 2015). Studies show that the step-wise methods used by WISE work for empowering marginalised immigrant women in the labour market (Bailey et al., 2018; Molnár & Havas, 2019; Rantisi & Leslie, 2021). They play a role in integrating language skills and job training (Kraff & Jernsand, 2021). Further, women participating in parallel chains of activities achieve greater progression than women participating in just one activity at a time (Ali et al., 2019).

Studies show that, for social enterprises to prosper, they rely on a supportive ecosystem of regulation, financing, advice on the national norms and the historical political context (Nicholls et al., 2015; Gawell, 2019), as well as, specifically, on WISE collaborations among cooperatives (Laurelii, 2002). These legitimating forces vary across Europe, reflecting different welfare systems (Esping-Andersen, 1990) but also development over time (Borzaga et al., 2020).

In Sweden, challenges that hinder WISE from becoming legitimate actors of work integration are manifested in short-term public contracts, often lasting only a year or two (Edvik & Björk, 2016; Fred, 2018; Segnestam Larsson, 2019) and bureaucracy, as public organisations prioritise dealing with actors that potentially offer efficient administration and generic large-scale solutions (Kraff & Jernesand, 2021). To this can be added WISE's lack of long-term stable financing to support development (Borzaga et al., 2020; Nachemson-Ekwall, 2021). Finally, a market liberal approach to the EU public procurement rules has fostered competition

and financial austerity, resulting in the preference for large associations, with small companies and value-based enterprises opting out of bidding on contracts (Gawell, 2019; Segnestam Larsson, 2019; Nachemson-Ekwall, 2021).

As mentioned before, the lack of a legal form for social enterprises and clear definition of WISE in Sweden (Gawell, 2019), though it exists in many European countries (Defourny & Nyssens, 2008; Palmås, 2013), hampers the ability to direct financial resources and is manifested by a lack of a government-sponsored social financial investment funds (Tillväxtverket, 2018; Nachemson-Ekwall, 2021).

Other challenges include the WISE themselves, with complex business models with businesses in different sectors, multifaceted management and heterogenous employees. Too many small-sized businesses, good for empowerment but difficult for sustaining a long-term stable business due to lack of scale (Hedin et al., 2015). Sharing resources by developing collaborations through networks and closer ties to the public and private sectors is suggested as a solution but risks the role of WISE as an independent third-party actor (Lindberg 2021b).

WISE are also criticised from an empowerment perspective. As described in Hedin et al. (2015), the democratic dimension of the cooperative model of governance is often unclear. There may be inconsistencies in what inclusiveness means and how it is enacted, with many employees disinclined or unable to become involved in governance relative to doing their own work. There might also be mission drift, as the degree of marginalisation of the participants correlates with costs (Molnar & Havas, 2019), and higher marginalisation relates to more training and higher costs (Ebrahim et al., 2014).

In sum, the literature illustrates Sweden as politically torn between being a classic Nordic welfare system and having a liberal market economy (Lundström & Wijkström, 1997; Pestoff & Hulgård, 2016). However, there are signs that in the post-Covid-19 pandemic era a reconsideration of public labour policy might offer an opening for social enterprises. Hybrid organisations such as WISE are customised to challenge the established order (Defourny et al., 2014) and can open new opportunities.

### EXAMPLES AND RESULTS

The empirical part of this study begins with a description of how WISE are structured. As an analytical tool, the institutional complexity of the organisational, societal and business goals of WISE are visualised as two integrated flows joined together by the WISE (Fig. 9.1). At the centre core is the WISE, delivering services like work, language training and supervision. The methods used by WISE are called names like Value chains (*värdekedjor*) and the Step model (*trappstegsmodellen*). None are unique methods for work integration per se, it is the systematic approach in itself that is unique. A rehabilitation programme usually involves an individual plan with personal supervision of steps that take between six months and two years to complete.

The vertical flow illustrates the input consisting of unemployed immigrant women who are registered at the AF, in direct contact with a municipal Socialtjänsten (SSO—Social Service Office), or engaged in an employment initiative coordinated by the region. The WISE deliver the intervention. At the end of the vertical flow, the output is illustrated as the

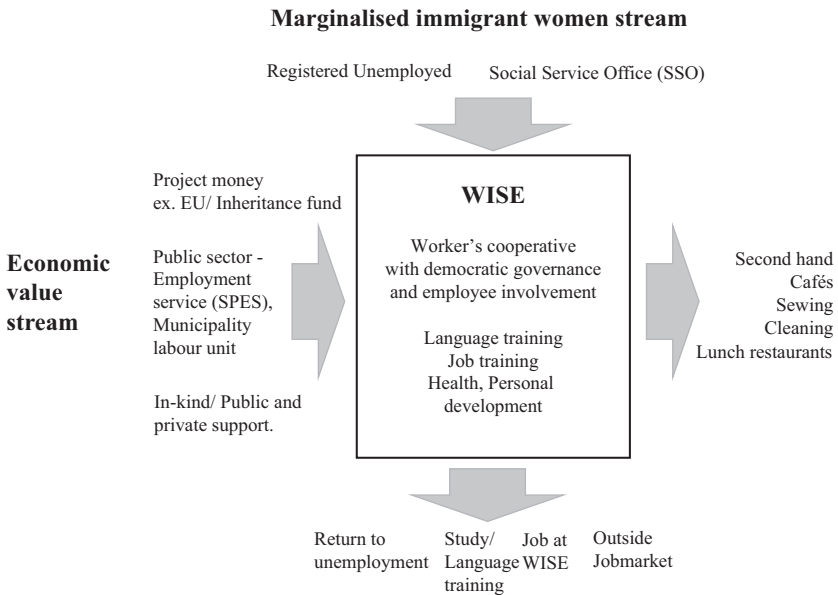


Fig. 9.1 The WISE business structure. *Source:* author

target participant either having entered the outside labour market, gotten a job at the WISE, started an apprentice programme, started studying or returned to unemployment. An outcome can also be that a person moves from being on social welfare to registered as unemployed.

The horizontal flow illustrates the economic input with publicly procured pre-work introduction to develop work capability, work integration and training. The services are procured by AF, Socialtjänsten and the municipality's own labour unit (Hedin et al., 2015). A subsidised labour cost is tied to each participant and paid by AF or the municipality. WISE and similar social enterprises may also receive project funding from organisations, like the European Social Fund (ESF) or the Heritage Fund. As that market is relatively limited in Sweden, purely philanthropic funds are generally not used (Gawell, 2019). There is also a small, but growing, market for public value-based partnerships, so-called Idéburet offentligt partnerskap (IOP—Value-driven Public Partnership).

The output from the horizontal flow consists of goods and services for the market. The customers come from the public sector, companies and the retail segment. It is common that buyers from the public sector and companies contribute in kind through subsidised rent for premises or equipment.

### *Seven Examples and Major Findings*

Examples of seven WISE and networks of WISE are included in this study. The examples are listed in Table 9.1. Interviewees were asked to state their organisations' achievements, financial positions, opportunities and challenges. The lack of publicly available registers makes the material dependent on the informants' willingness to share information. Despite this limitation, patterns are detected in the respondents' answers and are developed below.

### *The Financial Outcome of WISE*

The first pattern relates to documentation of the financial effects of WISE's work with marginalised immigrant women. A report by Nilsson & Wadeskog (2006) shows that 20 women in the social women cooperative Yalla Trappan (Yalla Staircase) generated SEK 80 million in savings for society over a four-year period; the involvement and empowerment of the immigrant women is not included. Another example is BlåVägen (the Blue

**Table 9.1** List of seven examples of WISE and networks of WISE

<i>WISE</i>	<i>Location</i>	<i>Immigrant women in programmes</i>	<i>Collaborations</i>	<i>Turnover</i>	<i>Comment</i>
BlåVägen (the Blue Way)	Municipalities in the Stockholm region	150 employees (2021) 450 (2020) and 650 (2019)	Lost contact with SPES due to changes in the FAT programme	SEK 12 million (2020), SEK 24 million (2015)	Part of the KROM programme
Yalla Trappan (the Yalla Staircase)	7 locations in Malmö region + 8 around Sweden	50 employed+ +120 in rehabilitation, Malmö	IOP with municipality and 6 contracts with businesses	SEK 16 million (2020)	55% private, 45% public partnership
En Trappa Upp (One stair up)	Falkenberg and Halmstad	13 members+50 employees, 7 migrant women	IOP with Halmstad	No information	Dependent on public financing
Vägen ut! (The Way Out! Coops)	Region Västra Götaland	150 + 30 owners	Works with social trade, a platform for social business offering	SEK 40 million	70% private, 30% public work training
TingoKaka	Uppsala	30 at the most at 3 venues, a church café remains (to be closed down)	Only with the local church	No financing as SPES demanded scale	Had an IOP with Uppsala
Companion Värmland	Filipstad	7 Arab speaking and 6 Somalis, illiterate individuals	No information	No information/ in restart mode	54% private, 45% public partnership
Funkis	Karlskoga	25 employed, 30 people in day-practice, in total 60 people	Network of 5 WISE with both public and private customers	SEK 6–7 million and profitable	Overall SEK 20 million, 50 employed and 150 in work training (before 170)

Way), which publicises socio-economic accounts in 2008 showing savings of SEK 68 million, where the participants fared better and 30% of the participants in job training moved on to work, a high rate considering the target group (Lindberg, 2021a, 2021b). The Blue Way also documents the number of participants who got a job between 2011 and 2018, amounting to around 150 per year, varying between 30% and 40% of those who had terminated a programme. Building on the same accounting methodology, The Way-Out! cooperatives estimate having generated SEK 55 million in societal savings in 2020, both from reduced public expenditure and income (and tax) from the employment they generated.

Interviewees from two municipalities claim to have experienced both lower costs and higher outputs when collaborating and outsourcing work integration to WISE. The labour market unit at Nordanstig, a municipality in the Gävleborg region with 9500 inhabitants, previously employed five supervisors in own premises at a cost of a few million SEK per year. Now the labour market unit has instead a partnership with four WISE employing 30 people at a total cost of half a million SEK per year. There is no documentation of the outcome, but the labour unit head claims there are positive effects.

When we ran the sheltered workshops in-house it sometimes felt as if the workers were there for the supervisors and not the other way around. It happened that workers stayed to keep the supervisors busy. Now I can act more professionally. (Head of labour unit at Nordanstig)

The labour market unit at Karlskoga, a municipality in the Värmland region with 30,000 inhabitants, previously employed 2.5 supervisors at a cost of SEK 2.5 million plus own premises and two cars. The labour market unit supported the development of a WISE, Funkis, that instead offers 25 jobs, mainly to immigrant women. The cost was more than halved to SEK 1 million. According to the civil servant head of the labour unit, Karlskoga is expanding the work to a total of five WISE, with a total of 150 training places.

The second pattern relates to the seven examples highlighting three institutional challenges for WISE related to work integration of marginalised immigrant women. Table 9.2 summarises the challenges in three main aspects that are described following the table.

**Table 9.2** Challenging factors at institutional level

<i>Hindrances</i>	<i>What</i>
Legal	Government sets a general definition of social enterprise (2018) Market liberal approach to EU's public procurement regulation No implementation of EU Art. 20 (sheltered workshops) Art. 77 (reserved contracts) in public procurement regulation
Access to finance	Absence of public-sponsored social investment fund(s) Reliance on project financing No stable social financial infrastructure
Labour policy	Enhanced work-training (FAT, Förstärkt arbetsträning) General work training, "Support and Matching Service" (STOM and KROM) Job training as part of rehabilitation

### *Challenge 1—Policy towards WISE*

In 2018, Sweden presented a strategy for social enterprises that included a new definition (Regeringskansliet, 2018). However, it did not address WISE specifically. The definition stated that the purpose of a social enterprise should be to solve a societal challenge, results measured primarily in socially beneficial goals, and most profits reinvested in the enterprise or similar businesses. The strategy's purpose is to facilitate scalability and access to risk capital, allowing for foundation and faith-based organisational ownership. This definition negatively affected WISE, as their democratic governance principles were perceived to be a challenge for growth and access to risk capital.

When there is no clear distinction between social enterprises and for-profit corporations, it is left to each individual municipality and region to develop its own definition. That is not realistic and many of them just open up all procurement contracts for competition. (Development manager, Region Örebro)

All interviewed WISE informants claim to have experienced difficulties in offering a whole chain of non-standard activities to municipalities or AF, as these are generally perceived as breaking public procurement rules. An example of this is found in the AF offer from 2019 of Förstärkt arbetsträning (FAT—Enhanced Labour Training) (Regeringen, 2017).



Language training or computer proficiency were not to be seen as an integrated part of the programme with the consequence that WISE and other civil society actors did not receive economic compensation for this work. Most WISE opted out of FAT.

After 2019, AF no longer paid us for our efforts. After a site inspection, we received a complaint because we had work consultants offering language training, as language training was not included among the 20 procured operations. We were asked to adapt our offer to the procured courses. But our target group, some are even illiterate, is not helped by a lecture lasting a specific length. (Development manager, Blue Way)

Furthermore, the EU (2014) public procurement directive addresses sheltered workshops in Article 20 and reserved contracts for certain social services, including work integration through social cooperatives in Article 77. In 2019, AF introduced reserved contracts for Arbetsintegrerade övningsplatser (AÖP—work-integrating training positions). Only Samhall and WISE could be eligible for this.<sup>2</sup> This was appealed by faith-based communities that did not qualify as they did not offer work-integration in a separate entity and the overarching goal was instead “soul-searching and humanitarian work”; in other words, not work integration (HFD, 2021, the Supreme Administrative Court). This further increased uncertainty for many public procurement officers.

Lastly, a government commissioned inquiry on the development of value-based, non-profit organisations in health and social services was presented in 2019 (Regeringen, 2019). In the inquiry, value-based actors are defined in congruence with the 2018 definition of social enterprises, thus blurring the democratic role for social cooperatives further. This is scheduled to be implemented in January 2023. Consequently, WISE are having difficulties in both handling the private sectors’ quest for a liberal market-oriented approach to EU’s public procurement policy and handling conflicting business rationales within the civil society community itself.

<sup>2</sup>EU public procurement regulation (Ch. 4:18) states that a public authority can take social considerations into account by reserving procurement contracts for sheltered workshops or suppliers whose primary purpose is social and professional integration.

### *Challenge 2—Access to Finance*

Studies show that most social enterprises rely on multiple sources of funding (Evers et al., 2014). Public financing is often the most important component, but there is usually a degree of (financial) co-responsibility from civil society or the business sector. Funding is often precarious and time-limited, thus preventing long-term market building or R&D activities. Difficulties in accessing finance is compounded by a lack of investment skills and a poor ability to develop adequate business project proposals. The examples support this picture.

The lack of access to finance is addressed by both the European Fund for Strategic Investments (EFSI) and the EU Programme for Employment and Social Innovation (EaSI). Both funds offer grants and microfinancing to social enterprises. Recipients of EU funding and guarantees highlight the positive signalling effect this has had on commitment by other investors (Scheck, 2019).

Studies of the Swedish WISE reveal that more than half of the revenue stream is from the public sector, either through paying for the employees' wages or purchasing of services/products (Hallström Hjort & Nilsson, 2021). However, public funding tends to be short-term and municipalities, to circumvent public procurement rules, adhered to project financing that was dependent on the municipalities' yearly budgeting process (Edvik & Björk, 2016).

Most WISE in this study had received project funding from ESF. Despite signalling legitimacy, the outcome was limited and ESF funding followed the same trajectory as other public project funding mechanisms, that is, time-limited and lacking necessary support for long-lasting employment results (Lindberg 2021b; Lindberg et al., 2022).

Sweden's infrastructure for supporting social economy organisations with advisors and financing is limited compared to many other EU countries (Nachemson-Ekwall, 2018, 2021; Tillväxtverket, 2018). Studies and reports indicate limited capacity to enable scaling up (Tillväxtverket, 2018; Nachemson-Ekwall, 2021). Companion, a publicly supported corporate development agency with 20 offices around Sweden, and the Mikrofonden Sweden, a social investment fund, are both hampered by a lack of long-term public financing. The Chairperson of the board of Ekobanken, a cooperative social bank highlights, in an interview for this study, that the bank could support many more customers if the Government followed the

lead of other EU countries and offered access to supportive social credit guarantees.

All WISE in this study present examples of the negative impact that lack of access to stable financing has caused. Vågen ut! Kopperativen (The Way Out! Cooperatives) consist of a network of 20 WISE situated in the Västra Götaland region. The combined turnover is SEK 40 million, of which 70% originates from sales (private and public) and 30% from work training. The network receives cashflow support credit from Mikrofonden Sweden, loans from Ekobanken, and project grants from ESF. The HR manager explains the dilemma with a lack of long-term financing.

The Way Out! Cooperatives need 5 million kronor. We run a café but lack the capital to invest in a new grill. We can apply for project grants, but do not receive a structural grant to be able to build up a buffer for investments. If we had known that we would have repeat business from the municipality or the private sector we could have grown. (HR manager, Way Out! Cooperatives)

### *Challenge 3—Labour Programmes*

In general, there are three established public programmes for work training targeting low-skilled, local language weak immigrant women:

1. *enhanced work-training* (FAT). Offered by AF, this includes simple jobs, like subcontracting work, cleaning, janitorial and coffee. In general, only social enterprises, like WISE and faith communities, and the government-sponsored Samhall, are eligible for this service;
2. *general work training*, the so-called Stöd och matchning (STOM—Support and Matching Service) and Customer-choice—Kundval Rusta och matcha (KROM—Prepare and Match Service) are regulated through the EU public procurement rules and can last up to 12 months;
3. *work-integrating training positions* (Arbetsintegrerande övningssplatser, AÖP). This programme is administrated by the municipality labour unit. It provides more secure basic funding for social enterprises but also exposes them to short-term contracts, individual civil servants and the risk of being subject to public procurement regulation.

A report from Tillväxtverket in 2018 quotes reports, regulation letters, government notes and academic papers that describes the lack of coordination and collaboration between different job-supportive offerings directed to marginalised women. Statistics from AF, publicised in 2019 and 2020, reveal a lack of success in the labour programme offering related to foreign-born women compared to other groups of long-term unemployed, even when activities are designed to prioritise this group (Frydebo & Kaufmann, 2019; AF, 2020a, 2020b). Additionally, participants in the established public programmes find it difficult to attend activities organised by WISE, as they might be scheduled for Swedish-language classes, known as Svenska för invandrare (SFI—Swedish for Immigrants) at the same time or at locations far away (Kraff & Jernsand, 2021).

In interviews, it is reported that the FAT programme is financially ill-suited for WISE as they often receive 20% lower compensation than the sheltered workshop, Samhall. This led many WISE, as well as other social enterprises, to opt out of the programme. At the same time, the private sector experienced competition in, for example, the cleaning sector. The EU Commission claims that Samhall leveraged subsidised wages to offer lower prices for cleaning contracts, thus a clear violation of state aid rules (EC, 2017). The Swedish Competition Authority has condemned Samhall's activities (Konkurrensverket, 2020), and Samhall is subject to public debate (Riksdagen, 2021b; Torp, 2021).

The second offer involves STOM and KROM. The programmes were revised and developed at a time when AF was restructured and downsized following decisions by both left and right-centred governments. The programmes are open for public procurement, free choice by the customer and earn performance-based compensation. Suppliers must meet financial and organisational requirements, have relevant experience, offer supervision and language support/interpreters, be able to receive at least 50 simultaneous participants and act nationally. This automatically excludes many WISE as most WISE employ less than 10 people each. Few collaborate nationally and performance-based compensation does not consider that social cooperatives or civil society actors more often lack a capital buffer. Thus, the system favours for-profit corporates and large entities, while also enticing suppliers to work with those unemployed who only need

standard training programmes that are less costly, thus excluding those with the greatest need for out of work training.

A study conducted by Institutet för arbetsmarknads-och utbildningspolitisk utvärdering (IFAU—the Institute for Evaluation of Labour Market and Education Policy) concludes that the KROM search engine did not adequately address that job seekers' job chances decrease the longer they had been unemployed or that low-skilled job seekers were not able to register correctly due to a lack of local language skills or for health reasons (Benmarker et al., 2021). Thus, many WISE and faith-based institutions have abstained from participating in KROM. Further, AF has applied procurement rules in such a way that it has stopped sending unemployed individuals directly to WISE.

The Blue Way could do more if we were commissioned. The City of Stockholm has 300–350 job seekers registered but they are not allowed to send them to us because they must first be matched via KROM, even though the city knows that they are not suitable. (Manager, Blue Way)

Representatives from civil society claim that a lack of assignments on work rehabilitation and work placement to WISE caused many to go bankrupt (Wallenius et al., 2020).

We have lost 20% of the members who were WISE. Half of the Companion offices have stopped recommending the start of a WISE. To be able to succeed, we require a long-term strategic cooperation with Arbetsförmedlingen. (Chair, Companion)

The third option for WISE is signing collaborative agreements with municipality SSO. An example of this is Yalla Staircase which signed a project partnership with the municipality of Malmö using the IOP framework. It works with a step-wise programme, Yallas väg till arbete 2.0 (Yalla's path to work). The offer targets 50–60 women for a six month-period. According to the CEO of Yalla Staircase, the participants go on to internships, SFI and obtain jobs at Yalla or in private companies. No one is left behind. However, IOPs are few and interviewees explain that many municipalities find that they are too difficult to design and might conflict with public procurement regulation.

### *Going Forward*

The third and last pattern in the seven examples relate to expectations of changes in Swedish society. The role of the public employment service, AF, is again under government review. In a Ministry of Employment publication (Regeringskansliet, 2021), third sector actors, including cooperatives and work integrating social enterprises, are mentioned.

The added value that idea-based actors bring to the labour market policy activities also need to be utilised in the reformed activities. The Swedish Public Employment Service therefore needs to have as a starting point that there should also be good prerequisites for collaboration with such actors, e.g., non-profit associations, registered faith communities and foundations, cooperative organisations and work-integrating and social enterprise. (Regeringskansliet, 2021, p. 42)

In autumn 2021, the Supreme Administrative Court ruled against the faith communities and allowed reserved contracts for labour integration (using Article 77 for associations focused on work integration) through WISE (HFD, 2021).

There are also initiatives to build collaborative networks among smaller WISE. The Yalla Staircase comprises a network of a diverse set of WISE at eight locations around Sweden. The Way Out! Cooperatives is a network of 12 WISE. It helps WISE to collectively submit tenders for public procurements but also to leverage on the increased interest for social sustainability in the private sector. An HR manager at Way Out! explains:

[o]ur next step is to develop our joint business offer to companies that want to support our group of social enterprises financially, so we can invest to grow and become stable. We sell little to the business community today, but we meet a greater understanding for our social contribution, which we believe we can use to increase our business. (HR manager, Way Out! Cooperatives)

Örebro region collaborates with 15 WISE. There is an action plan on the political agenda. The municipality, Nordanstig, meeting with the four WISE in its region, enticing them to collaborate and share resources. Skoopi, representing Swedish WISE, runs the project ASF lyfter with the aim of developing collaborations when bidding for public procurement. All initiatives have received project funding from ESF.

Skoopii has developed a certification system for WISE following a standard set-up by the Svenska institutet för standarder (SIS—Swedish Institute for Standards). The standard is expected to work as a template for public sector procurement with social clauses. The focus is on evaluation of work progression. There is also work done to develop socio-economic accounts. All WISE in this study mention a growing interest in social clauses in public procurement.

There are also signs that the business sector is increasing their interest in collaborating with WISE. An example of this is Trianon, a property company that owns apartment blocks in run-down and suburbs with low socio-economic status in the Malmö region. Trianon is teamed up with Yalla Staircase, offering both a venue for a café and cleaning service by immigrant women. The partnership is part of Trianon's engagement with the UN Sustainable Development Goals and included in the company's sustainability bond programme. Yalla Staircase in Malmö has also signed partnerships with other property companies. Yalla also collaborates with the furniture company Ikea and retail store H&M.

It's a bit ironic. At the same time the private sector is reaching out and wishes that we support them in their aim to deliver on the social SDGs, the public sector has taken a step back. (CEO, Yalla Staircase)

## DISCUSSION

Organised as a hybrid non-traditional business model, WISE interact with the public and private sectors in new ways with work integration of local language weak and lower educated immigrant women. A new organisation's ability to create constructive collaborations (Suchman, 1995; Suddaby & Greenwood, 2005; Pache & Santos, 2012) leans on its capability to be respected as a legitimate partner. This process is two-fold. On the one hand, new organisational constructs—such as WISE—must conform to the requirements of external environments for legitimacy (Meyer & Rowan, 1977). It is often possible to find compromises in order for social innovation to gain legitimacy (at both normative and cognitive levels: cf. Suchman, 1995). On the other hand, social enterprises are also seen as challenging the Western organisational order as they privatise the social, dismantle the state or undermine civil society (Nicholls & Cho, 2006). As explored in this chapter, WISE work to gain status as a legitimate partner

has had difficulties handling these contradictions within the Swedish context.

The legitimisation process of Swedish WISE can be seen as emerging through three phases of embeddedness. In the first phase, roughly 1990–2009, the role that WISE play as a labour integration provider in the Swedish welfare state differs from more liberal market economies such as Canada, the United Kingdom and the United States, as well as in countries with more social conservative traditions, such as Belgium, France and Germany (cf. Esping-Andersen, 1990; Sivesind, 2016). In the second phase, roughly 2010–2020, the institutional context acted in a contradictory way. WISE and related social enterprises received support, for example, through project funding, while other policies worked in the opposite direction. WISE were not recognised for their multifaceted capability for labour market integration, empowerment and fostering of democratic citizens. Neither the private nor the public sector have stepped forward to support the development of a supportive financial infrastructure (Nachemson-Ekwall, 2018, 2021) present in various degrees in other countries (Defourny & Nyssens, 2008; Pache & Santos, 2012; Nicholls et al., 2015).

In the third phase, starting in the early years of 2020s, post-Covid-19, there are signs that a changing and more resilient public labour policy might free both public and private resources to support WISE working with low-skilled and local language weak immigrant women. Politicians, both left and right, highlight paid work to handle the socio-economic challenges in the suburbs, where inhabitants (especially marginalised low-skilled immigrant women) were hit hardest by Covid-19, both from a health and labour market aspect (Riksdagen, 2021a; Regeringskansliet, 2022).

## CONCLUSION

In this research, I focus on the Swedish challenge of labour integration of lower educated and local language weak immigrant women. As a societal challenge, characterised by many interdependent factors, this so-called wicked problem (Nicholls et al., 2015) of unemployed immigrant women does not easily fit into standardised labour policy programmes. This is shown to be especially challenging for welfare states like Sweden, which assumes that social integration is primarily achieved through paid work (Erhel et al., 1996).



Signs of a rebalancing of the Swedish societal contract are threefold. First, the post-Covid-19 push for the S in the Sustainable Development Goals highlights the necessity for both the private and public sectors, along with investors, to take a more active role in tackling the socio-economic gap. Secondly, the forming of organisational maturity within the WISE invite a professional approach to collaborations and networks, which can strengthen WISE joint offers to the public and private sectors. Lastly, there is increased societal understanding of the necessity to both value and deploy resources to enable systematic use of impact metrics. This will increase resilience and readiness for cross-sectorial partnerships during the coming period of more socially labelled public procurement rules. The three changes are all necessary ingredients in the work to develop a supportive social financial infrastructure, framed here as the emergence of financial legitimacy.

Finally, a more resilient institutional environment, where changing expectations rebalance the societal contract of the public and private in favour of a clearer focus on the social SDGs, might free resources for experimentation with social enterprises like WISE going forward. Such a development may support the acceptance of new models to handle complex societal challenges. This will increase readiness for partnerships between WISE and actors in the public and private sectors—if, and when, Sweden develops a supportive social financial infrastructure and public procurement rules.

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# Skill Requirements and Employment of Immigrants in Swedish Hospitality

*Aliaksei Kazlou*  and *Karl Wennberg* 

## INTRODUCTION

Structural change in labour markets due to migration are characterised by a more diverse workforce in terms of workers' national origin, their reasons for immigration, level of education and qualifications. At the same time, skills requirements for jobs are changing with an increasing share of service sectors jobs, changes exacerbated by the Covid-19 pandemic's effect on physical workplaces, and rapidly expanding online delivery of goods. For many years, the share of permanent jobs has also been in

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decline in most developed countries (Thornley, 2006), making migrant workers more exposed to changes in job content and skills required to handle those jobs. As of 2022, workplaces increasingly require skilled workers to handle more complex and interactive tasks. Employees must have sufficient skills to become a part of labour force within the changing requirements of jobs due to technological change like digitalisation (van Laar et al., 2017).

National labour markets throughout Europe and North America has also become more diverse in terms of workers' national background (Kazlou & Urban, 2023). In this chapter, we study Sweden, where, as of 2022, more than a fifth of the active labour force is born abroad, a vast increase since the 1990s. Furthermore, historically, migration has tended to consist of more homogenous groups arriving in intervals due to host country labour shortages or due to conflicts in a specific country or region. However, migrants are increasingly diverse in terms of country of origin, reasons for immigration, age, gender, level of education and skills (Meissner, 2015). These migrants join the host country labour force as students, as labour migrants, as kin to current residents and as refugees fleeing conflict and persecution in their home countries.

This chapter probes the questions of why and how immigrant employees are overrepresented in the hospitality industry compared to other low-skilled industries. We examine labour market segmentation across immigrant groups compared to native workers in Sweden. We focus on the hospitality sector, which employs an increasing share of the immigrant workforce (Åslund et al., 2014; Přivara & Kiner, 2020; Sönmez et al., 2020). The chapter investigates the sorting of immigrants and natives into jobs with different levels of skill requirements and according to their ethnicity<sup>1</sup> (Ponomareva et al., 2022) within the three comparable low-skill industries: hospitality, retail and construction. Jointly, we examine how different ethnic groups may be sorting into different sectors (Åslund et al., 2014). We also probe how the skill composition of service jobs shape ethnic labour market segmentation among male and female workers as well as foreign-born and natives.

<sup>1</sup>We approximate “ethnicity” with “country of origin” of immigrants. While this is far from identical (any country is likely to have different ethnic groups and simply naturalising into a new country does not change one's self-perceived or societally categorised ethnicity), it comes with the advantages of being fairly generalisable and non-intrusive (Stevens et al., 2011).

This chapter combines detailed data on occupations and workers in the Swedish hospitality, construction and retail sectors matched with data on the skill requirements of these jobs based on standardised measures from the United States, thus providing a unique opportunity to study the sorting of immigrants by skills and ethnicity into different jobs and the increasing stratification of the labour market.

## THEORY AND PRIOR RESEARCH

### *Job Tasks and Job Skills*

Distinguishing between job tasks and job skills allows for a deeper understanding of how workers can fulfil different tasks in different industries applying the same type of skills. A task is defined as “a unit of work activity that produces output (goods and services)” and a skill is a worker’s “endowment of capabilities for performing various tasks” (Acemoglu & Autor, 2011, p. 1045). From an economic perspective, one would expect immigrants and natives with similar skills to perform similar tasks equally well and receive wages in the same range, unless statistical or taste-based discrimination is prevalent (Becker, 1964; see further Ahmed et al., 2023, this volume). Demand for routine tasks conducted by manual labour has decreased with the increasing availability and sophistication of computer technologies. This has led to job polarisation as the average earnings in jobs requiring different tasks increase (Acemoglu & Autor, 2011; Autor, 2015). However, such job polarisation may also affect job sorting across industries in distinct ways, whether different categories of workers, such as immigrant vs native workers, or between workers of different countries of origin. Job polarisation may decrease employment and earnings for many low-skilled workers overall (Autor & Dorn, 2013). Further, new technologies are found to primarily benefit workers with high interpersonal skills, especially those working in knowledge-intensive sectors (Deming, 2017). Existing research on skill-biased technological change focuses mostly primarily on manufacturing, even though service sectors are changing as rapidly due to digitalisation. Our study focuses specifically on the service sectors, which is also where stratification by country of origin has increased in most Western European labour markets since the 1990s (Storer et al., 2020).

### *Job Skills and Ethnic Stratification of Labour Markets*

Immigrants who hail from different countries tend to sort into different industries within jobs requiring different skills, not only as a function of their observable human capital (Waldinger & Lichter, 2003; Cortes, 2004) but also by country of origin. Within specific jobs, however, this development often means rising immigrant employment in non-routine-intensive jobs combined with declining employment in routine-intensive jobs (Cortes, 2008; Åslund et al., 2014). Hence, skill-biased technological change may partly explain why immigrants are overrepresented in the hospitality sector, especially for those jobs comprising non-codifiable personalised manual tasks.

These trends are argued to lead to increasing differences in earnings between workers within specific sectors as well as between immigrants and natives (Åberg and Müller, 2018; Heldt Cassel et al., 2018). It is primarily immigrant men in the blue-collar sectors whose job security and wage levels have suffered the most from automation and economic shocks (Autor & Dorn, 2013; Nachemson-Ekwall, 2023, this volume). Highly educated immigrants are found to largely specialise in jobs with high requirements of routine-task analytical skills (Peri & Sparber, 2011) while low-educated immigrants are more often found in jobs requiring manual technical tasks (Peri & Sparber, 2009). At the same time, the service sector is expanding, and manufacturing is in decline in terms of employment shares. As automation is increasingly affecting the service sector, including hospitality, different strata in the labour market may also be increasingly exposed to wage stagnation and substitution by new technologies such as automated booking systems, online delivery of food among restaurants etc. To gauge immigrants' labour market integration among those arriving when the country was "very open" to refugee and labour migrants we next scrutinise labour market stratification of native and migrant workers as well as with respect to migrant workers of different origins across three comparable "low-skilled" sectors.

### *Ethnic Stratification across Jobs and Industries*

Ethnic stratification in the labour market is explained by both economic theories of human capital and taste-based discrimination (cf. Ahmed et al., 2023) as well as theories of embeddedness into social structures of labour market hierarchy (Waldinger & Lichter, 2003; Massey, 2007). From an

economic perspective, employers demand various types of skills that are needed to perform various tasks; individual workers possess various skills based on their education, training and experiences; wages function as the price mechanism that ensures a proper matching of the two (Becker, 1964). In order to be integrated into local labour markets, immigrants must find jobs where their level of skills meets skills requirements, else they must develop those skills. Thus, systematic differences between native workers and various immigrant groups are attributable to variations in their levels of basic and country-specific human capital (Borjas, 1989). Such variation may be attributed to the home country context but also to changing skills requirements at jobs due to processes like digitalisation or economic adjustments as well as to policy changes. The demand for, and supply of, immigrants' skills may also mismatch due to employers' statistical or taste-based discrimination (Becker, 1964; Carlsson & Rooth, 2007). There are different explanations for the process of ethnic sorting into different industries. According to segmented labour market theory, native workers may be unwilling to take on certain jobs not simply because they generate low pay but also because they infer low status (Leontaridi, 1998). Immigrants, however, may be less picky due to a so-called dual frame of reference and limited options in host-country labour markets (Friberg & Midtbøen, 2018). The literature pays less attention to skill- and ethnicity-based sorting into different industries and jobs. Thereby, the allocation of immigrants in host-country labour markets is closely linked to labour market hierarchies reflecting the social structure of the societies within which they are embedded (Waldinger & Lichter, 2003).

However, the social structure also opens opportunities for network-based recruitment in labour market segments that are socio-ethnically segregated. While much previous research on labour market attachment and earnings potential among immigrant and native workers considers immigrants as a homogeneous group, others note segmented employment patterns by country of origin, whereby, for instance, some industries in many Western European economies are dominated by immigrants from Turkey or Asia, while other industries are dominated by immigrants from Eastern Europe. Åslund et al. (2014, p. 405) find that “[w]orkers who share an [national] origin with their managers earn higher wages and have lower [job] separation rates than dissimilar workers, but this pattern is driven by differences in unobserved worker characteristics”. The differential in skills requirements might partly represent the previously unobserved characteristics. Employers might also use their employees as referrals and personal

contacts to reduce the costs of finding good matches (Montgomery, 1991). Such origin- and skill-based job sorting cannot readily be explained by job polarisation but can be explained by theories of network-based recruitment and ethnic “niche formations” in labour market segments, whereby immigrants of same origin sort into specific industries (Waldinger, 2000; Friberg & Midtbøen, 2019). The sorting patterns are more likely to be explained by profit-maximizing concerns than by preference-based discrimination (Åslund et al., 2014; Ahmed et al., 2023). Thus, various labour market niches tend to be structured hierarchically in ways that may coincide with the social status of immigrant groups, resulting in divisions of labour following country of origin lines. Employees might also be sorted into different firms based on their language skills. A number of studies (e.g. Wilson & Portes, 1980) indicate that employers prefer to recruit employees who speak the same language. This implies that immigrants will be recruited by firms where fluency in the native language is of less importance or where most of the employees speak their own language.

### *Labour Market Segmentation of Immigrants and their Wages*

Ethnic labour market segmentation may inherently increase earning differentiation among immigrants in different sectors as well as between immigrants and natives (Åberg & Müller, 2018; Heldt Cassel et al., 2018). The demand side of job characteristics predefine sorting of immigrants into the lower tier of less well-paid and more precarious jobs as well as natives into the more well-paid and more stable jobs (Piore, 1983; Boje, 1986; McGovern, 2007). Thus, on the demand side, occupational skill requirements may be considered as an empirical measure for the emergence of more distinct labour market segments among immigrants and natives (Hudson, 2007). The supply side of immigrants into precarious jobs can be partly explained by homogeneous social networks spreading job information among co-ethnics (Waldinger & Lichter, 2003; Meyer & Vasey, 2020) because the information about available jobs and potential recruits circulates in ethnic-homogenous groups, which may lead to homogenisation in perceived and actual skills along ethnic boundaries (Andersson et al., 2014). Related to this is that job training and tacit knowledge transfer within co-ethnic groups contributes more for low-skilled occupations than formal training (Hammarstedt & Miao, 2020). This makes ethnic segmentation in some routine-based industries with high technical skills requirements more likely.

Gender differences within groups of immigrants and natives are also notable. Wages and employment level for men (immigrants and natives alike) are decreasing in low-skill sectors in the United States (Autor & Dorn, 2013). Immigrants also face a greater risk of losing their jobs due to digitalisation or economic turmoil as they are often specialised in jobs with high requirements for routine-task analytical skills (Peri & Sparber, 2011) or in jobs requiring manual technical tasks (Peri & Sparber, 2009). As automation is increasingly affecting the service sectors, including hospitality, different segments in the labour market may also be increasingly exposed to wage stagnation and substitution of immigrant workers by new technologies. We scrutinise these processes in the context of native and migrant workers as well as migrant workers of different countries of origin.

### *Migrant Workers in Services: The Case of Sweden*

Sweden is a suitable case for this study because it is a popular immigration destination country, especially after the country liberalised labour migration in 2008 (Kazlou & Klinthall, 2019). There is also a need to establish a baseline of sort that could then be used to assess labour market outcomes after several immigration waves that peaked in 2015 that could be followed long-term beyond the more recent changes brought about by the Covid-19 pandemic. This makes Sweden an interesting context in which to study the long-term outcomes of immigrants' labour market integration among those arriving when the country was "very open" to refugee and labour migrants (i.e. up until 2015).

This chapter investigates the differences in job sorting among immigrants according to their ethnicity (approximated by country of origin) into jobs and industries requiring different skills. We consider three industries with lower levels of entry barriers in terms of human capital: hospitality, construction and retail (MacKenzie et al., 2010), which are absorbing the largest share of immigrant's workforce (Vershinina et al., 2018). While low-skilled jobs in hospitality in Sweden and other Nordic countries rely heavily on immigrants (Foged & Peri, 2016; Friberg & Midtbøen, 2019), various types of immigrant workers tend to be found in similar types of low-wage jobs. Such ethnic segmentation stemming from workers of different ethnic background sorting into specific sectors is apparent in Sweden and other countries, such as Asian migrants being overrepresented in restaurants and Middle Eastern immigrants in grocery stores (Frank, 2018).

## METHODS AND DATA

Using Statistics Sweden's Longitudinal Integrated Database for Health Insurance (LISA) and occupation-education information at the individual level in 2012, we have access to comprehensive information, including the demographics and education of both immigrants and natives in different occupations. By matching the individual data from LISA with data on required skill characteristics for different occupations according to the International Labour Organization (ILO) and O\*NET (the Occupational Information Network), we suggest the fundamental premise that skill level requirements differ among jobs. Type of jobs are reported according to the Swedish Standard Classification of Occupations (SSYK), which is fully harmonised with the ILO's occupational classification categories.

Combining data on skills requirements from the O\*NET with individual-level data on the entire Swedish population during 2009–2012 allows us to analyse occupational employment as changes in demand for skills and the matched supply of immigrant and native employees. We select three industries that are similar in level of skills and that are generally considered as low- to medium-skilled sectors exhibiting fair entry rates for immigrant workers but differ in structure of specific skill requirements: hospitality, construction, and retail.

### *Job Skills Requirements*

We use O\*NET (Occupational Information Network) data traditionally collected based on existing jobs and positions requirements in the United States (Autor et al., 2003; Acemoglu & Autor, 2011). We follow earlier research using this data, which classifies jobs into three groups based on skill types and skill levels: routine work jobs, non-routine manual jobs and non-routine cognitive jobs (Kurer, 2019). The O\*NET data also distinguishes between *social* and *technical* skills in specific jobs. Social skills, including coordination, instructing, negotiation, persuasion and social perceptiveness, require deep knowledge of local language and cultural codes and, as such, are not easily fulfilled by immigrants. A set of technical skills including equipment maintenance and selection installation and so forth (see Table 10.3 in Appendix for details) are not related to the same degree to local cultural specificity and, therefore, can be fulfilled by immigrants and natives alike. Nevertheless, jobs requiring high levels of technical skills can often be substituted by machines because these often include elements of routine tasks.



Following Deming (2017), we focus on social and technical skills in our analysis. We compare the immigrants' prevalence in jobs with higher or lower demands for these types of skills, which we compare to native workers and further analyse by gender. The O\*NET task measures are often merged with country-specific data sources, subsequently used to calculate the task content of jobs in countries other than the United States (Goos et al., 2014). This approach is common as O\*NET offers rich and detailed data on occupations.

The constructed data allow us to examine cross-sectional patterns of labour markets segments with details regarding skills requirements for jobs and compare the skills structure of immigrants and natives in the three low-skilled industries: hospitality, retail and construction. We also distinguish ethnic nuances based on immigrants' country of origin. In our descriptive statistics, we aggregate the level of skills from the job title level to the industry level, weighted by number of people (in the industry) with a specific job. Table 10.1 shows descriptive statistics.

The descriptive statistics in Table 10.1 show that immigrant students are mostly employed in hospitality (28.3%). Hospitality also employed more refugees (18.2%) and family migrants (23.9%) than construction and retail. Only 11.7% of immigrants employed in hospitality arrived in Sweden as labour migrants, in contrast to the construction industry, where a larger share of labour migrants is employed (22.3%). The retail industry employs more students (29.3%) than labour migrants (5.6%).

Wages in hospitality are lower than the other two comparable industries of retail and construction. Immigrants' wages in hospitality are 28% less compared than those of natives. Immigrants also have lower levels of education than natives in hospitality and construction industries, but the same level as natives in the retail sector. Both immigrants and natives in hospitality are, on average, younger (32.6 and 37.7 years, respectively) than employees in the other industries. It is striking that it is mostly native women (73%) and immigrant men (72%) who are employed in the hospitality industry.

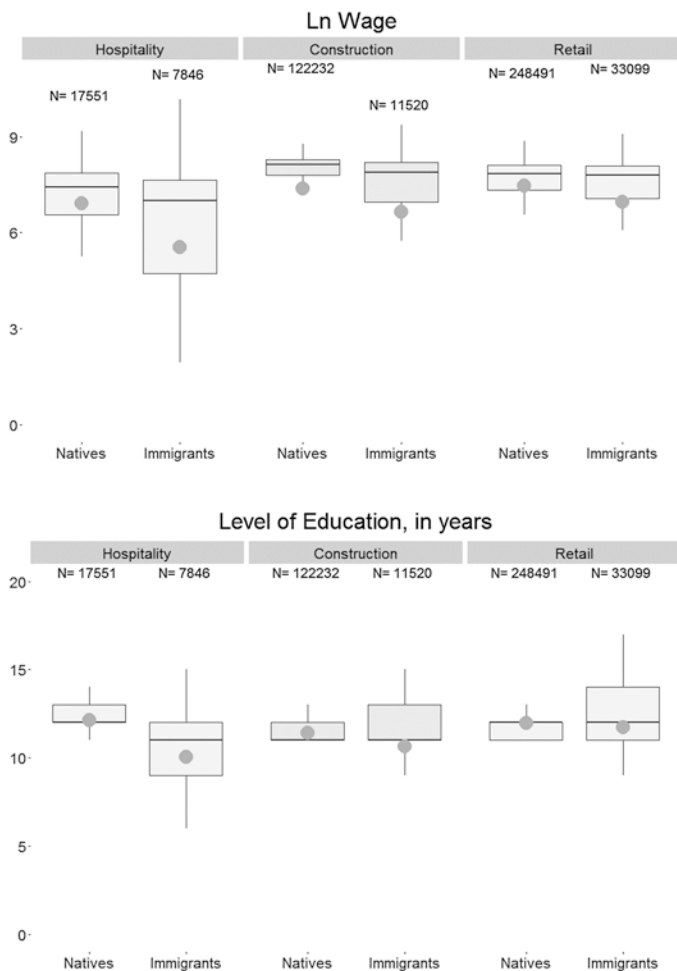
## RESULTS

Figure 10.1 shows that immigrants in the hospitality industry in Sweden in 2012 had lower wages (log-wages are on the vertical axis on the left box plots in Fig. 10.1) compared to natives, which can partly be explained by the fact that they have lower levels of education (the right box plots in Fig. 10.1).

**Table 10.1** Descriptive statistics: natives and immigrants in hospitality, construction and retail in 2012

	Hospitality		Construction		Retail	
	Natives	Immigrants	Natives	Immigrants	Natives	Immigrants
	N = 17,551	N = 7846	N = 122,232	N = 11,520	N = 248,491	N = 33,099
Wage, SEK per year	176,200	126,400	313,800	241,700	258,200	238,000
Education level, number of years	12.1 (1.62)	10.0 (3.84)	11.4 (1.61)	10.6 (4.10)	12.0 (1.75)	11.7 (3.11)
Social skills level	49.2 (6.49)	43.7 (6.52)	39.3 (5.81)	38.1 (5.57)	49.6 (7.16)	48.9 (7.92)
Technical skills level	12.7 (10.9)	32.3 (19.6)	28.9 (9.11)	28.7 (8.62)	17.3 (12.1)	18.5 (12.5)
Age, years	32.6 (10.9)	37.7 (9.89)	40.1 (11.4)	40.4 (10.1)	35.8 (11.6)	38.1 (10.6)
Gender (male = 1)	27%	72%	92.8%	92.2%	52.8%	52.9%
Reason for residence permit:						
For study		2224 (28.3%)		1333 (11.6%)		9705 (29.3%)
For family		1876 (23.9%)		1696 (14.7%)		7116 (21.5%)
Refugee		1429 (18.2%)		1433 (12.4%)		4285 (12.9%)
For work		916 (11.7%)		2565 (22.3%)		1838 (5.6%)
Unspecified		1401 (17.9%)		4493 (39.0%)		10,155 (30.7%)

Note: LISA data defines immigrants based on country of origin



**Fig. 10.1** Wages and education: immigrants vs natives in construction, retail and hospitality in 2012. *Note:* in the boxplots the dots indicate average and the horizontal lines mean values, the whiskers indicate minimum and maximum values, respectively, and horizontal boundaries of the box indicate values of the first and the third quartiles

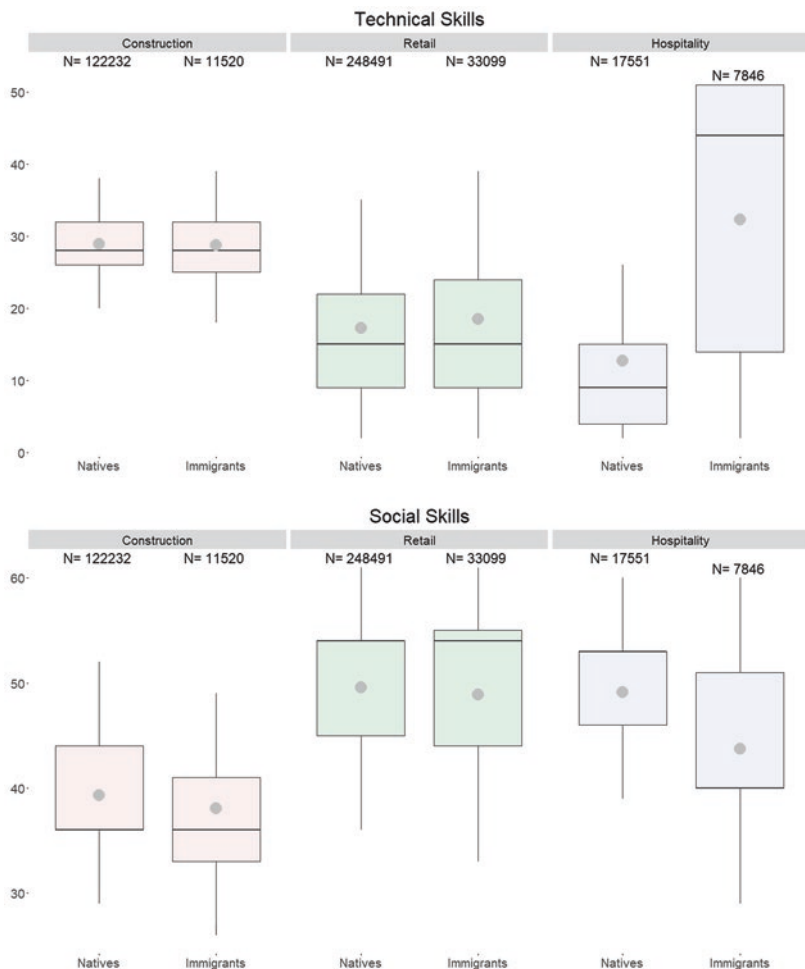
Stark evidence of opposing differences in composite skill levels across individual jobs in hospitality among immigrants and natives is shown in Fig. 10.2. The required level of social skills is much lower while the level of technical skills is much higher for those jobs occupied by immigrants compared to natives. At the same time, skill requirements are equally distributed in the retail and construction industries (Fig. 10.2), with the slight exception of jobs held by native workers in the construction sector having slightly higher requirements for social skills. In comparison to hospitality, neither retail nor construction exhibit such obvious differences among natives and immigrants in sorting to jobs requiring social or technical skills.

Figure 10.3 shows details for selected social (persuasion, negotiation and service orientation) and technical skill requirements for specific jobs by native and immigrant workers (equipment maintenance, equipment selection and installation; see Appendix for definition of the skills). Overall, Fig. 10.3 shows sharp and striking differences in employment patterns among immigrants and natives—immigrant workers are more often employed in jobs requiring lower level of social skills and a higher level of technical skills. These results are interesting and can reveal some risk bearing by immigrants due to substitutions of routine tasks by machines within digitalisation (van Laar et al., 2017), while jobs with higher requirements for social skills, frequently highlighted as important in people-to-people interaction and service-intensive work (Clark, 1993; Ivanov, 2020), are increasingly in demand in hospitality. The construction and retail industries do not have such striking differences in the sorting of immigrant and natives by skills.

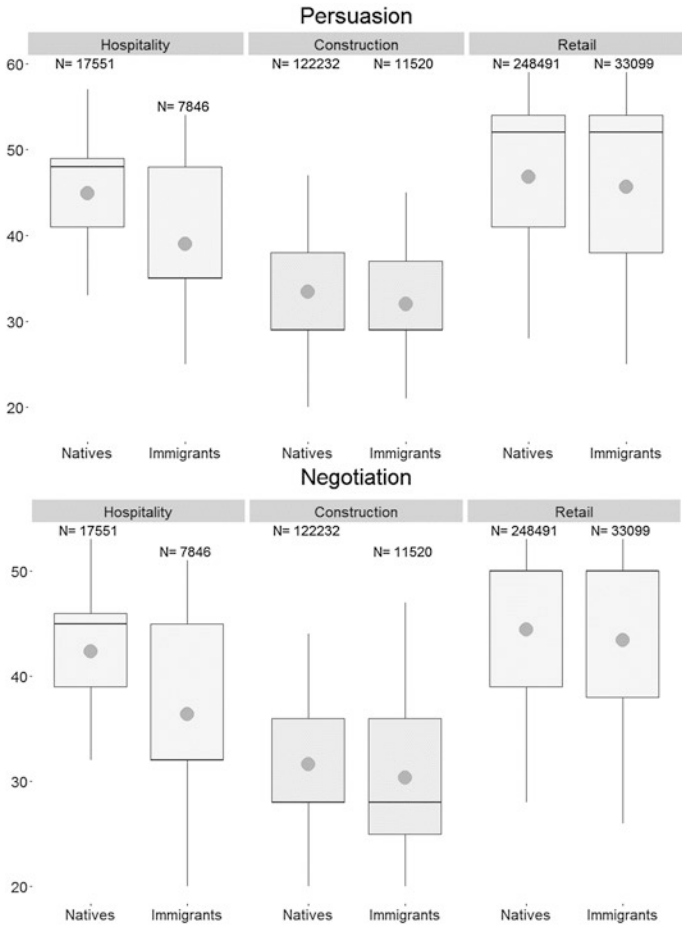
Together, the graphs in Fig. 10.3 highlight the starkly different ethnically based job segregation in the three sectors studied, where immigrants and natives are found in jobs with very distinct skills requirements in the hospitality sector, but not in the construction or retail sectors.

Table 10.2 shows the sorting of immigrants into the three selected industries by country of origin in 2012. Immigrants from Turkey comprise more than 25% of all immigrants employed in hospitality, followed by individuals from Iraq (13.6%) and Syria (8%) in our sample. Immigrants from Poland are overrepresented in the construction industry (19.7%), followed by representatives from Finland (17.1%) and former Yugoslav countries (8.7%). The retail industry represents a more balanced case, where immigrants from the former Yugoslavia are the largest group (15.7%), followed by immigrants from Iraq (10.3%) and Finland (7.5%).

Figure 10.4 reveals a clear pattern of segmentation by country of origin and gender in the three industries and shows the diversity regarding



**Fig. 10.2** Skill requirements in jobs: immigrants vs natives in construction, retail and hospitality in 2012. *Note:* in the boxplots the dots indicate average and the horizontal lines mean values, the whiskers indicate minimum and maximum values, respectively, and horizontal boundaries of the box indicate values of the first and the third quartiles



**Fig. 10.3** Social skills in jobs: natives vs immigrants in construction, retail and hospitality in 2012. *Note:* in the boxplots the dots indicate average and the horizontal lines mean values, the whiskers indicate minimum and maximum values, respectively, and horizontal boundaries of the box indicate values of the first and the third quartiles

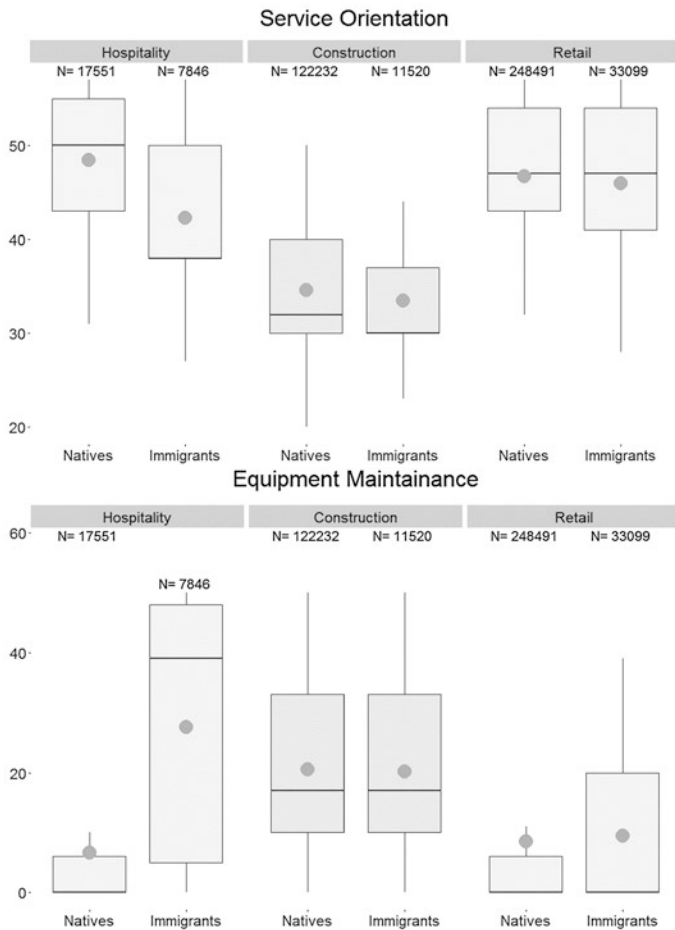


Fig. 10.3 (continued)

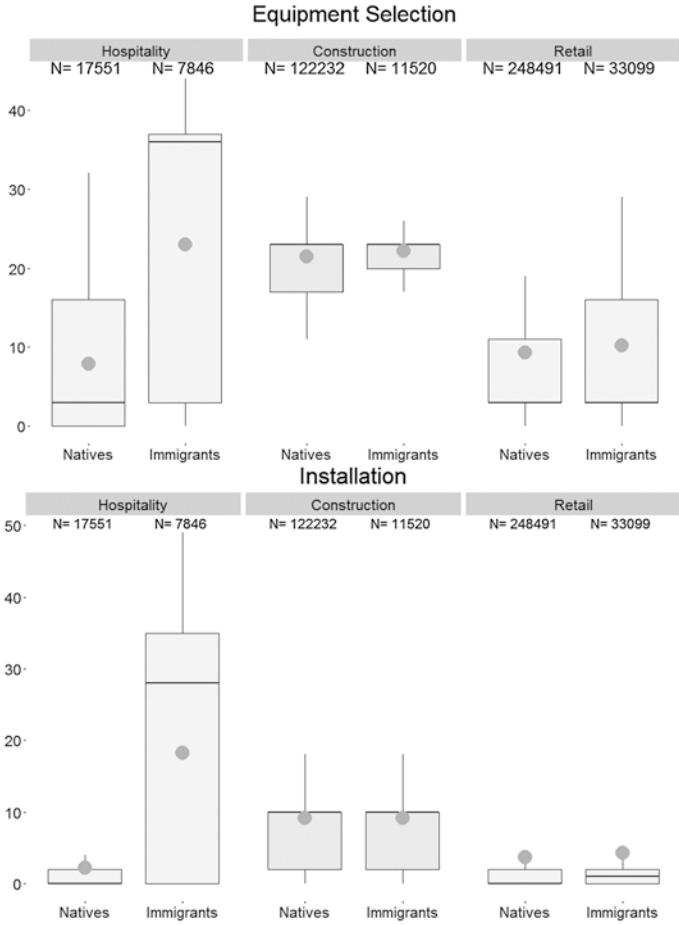
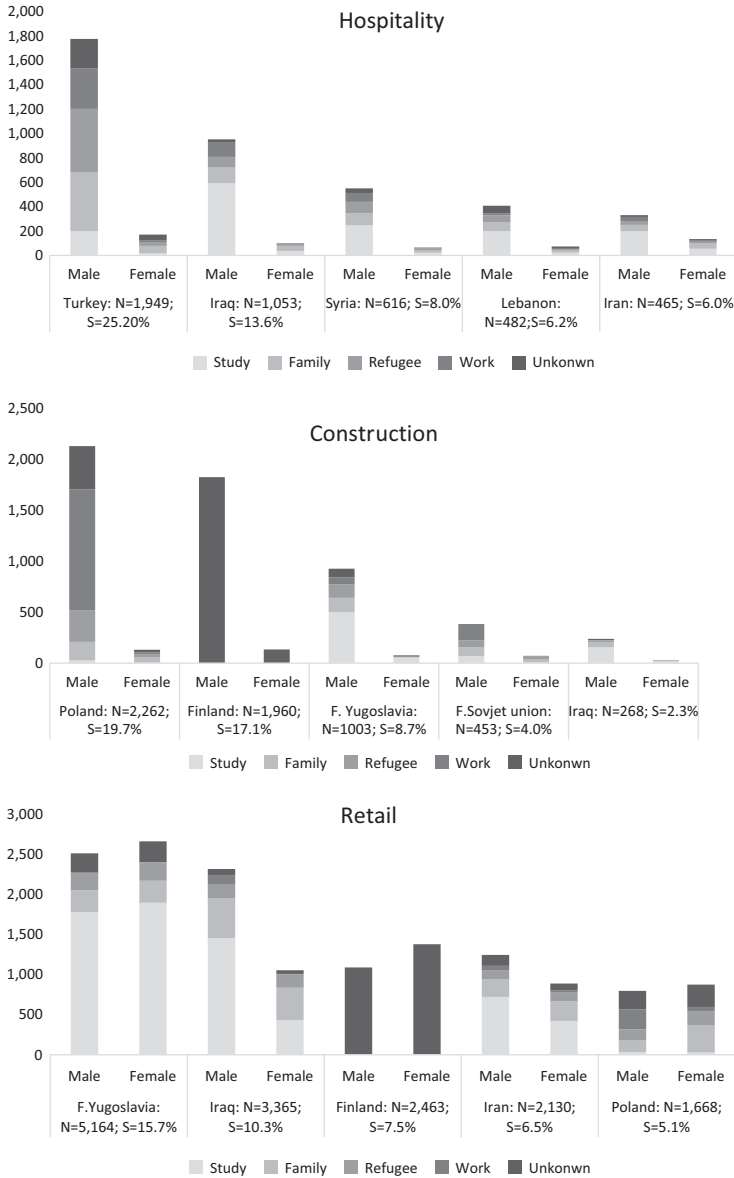


Fig. 10.3 (continued)



Table 10.2 Ethnic composition of immigrants employed in hospitality, retail and construction in 2012

<i>Hospitality</i>				<i>Construction</i>				<i>Retail</i>			
<i>Country</i>	<i>N</i>	<i>Share in industry</i>	<i>Country</i>	<i>N</i>	<i>Share in industry</i>	<i>Country</i>	<i>N</i>	<i>Share in industry</i>	<i>Country</i>	<i>N</i>	<i>Share in industry</i>
<b>Turkey</b>	<b>1949</b>	<b>25.20%</b>	<b>Poland</b>	<b>2262</b>	<b>19.70%</b>	<b>F. Yugoslavia</b>	<b>5164</b>	<b>15.70%</b>			
Study	218		Study	31		Study	3669				
Family	546		Family	233		Family	545				
Refugee	549		Refugee	341		Refugee	437				
Work	346		Work	1207		Work	20				
Unknown	290		Unknown	450		Unknown	493				
<b>Iraq</b>	<b>1053</b>	<b>13.60%</b>	<b>Finland</b>	<b>1960</b>	<b>17.10%</b>	<b>Iraq</b>	<b>3365</b>	<b>10.30%</b>			
Study	629		Study	0		Study	1885				
Family	171		Family	0		Family	900				
Refugee	103		Refugee	0		Refugee	332				
Work	124		Work	0		Work	118				
Unknown	n/a		Unknown	1960		Unknown	130				
<b>Syria</b>	<b>616</b>	<b>8.00%</b>	<b>E. Yugoslavia</b>	<b>1003</b>	<b>8.70%</b>	<b>Finland</b>	<b>2463</b>	<b>7.50%</b>			
Study	270		Study	553		Study	0				
Family	121		Family	148		Family	0				
Refugee	106		Refugee	136		Refugee	0				
Work	76		Work	71		Work	n/a				
Unknown	43		Unknown	95		Unknown	2462				
<b>Lebanon</b>	<b>482</b>	<b>6.20%</b>	<b>E. Soviet union</b>	<b>453</b>	<b>4.00%</b>	<b>Iran</b>	<b>2130</b>	<b>6.50%</b>			
Study	223		Study	78		Study	1141				
Family	96		Family	114		Family	465				
Refugee	65		Refugee	95		Refugee	215				
Work	n/a		Work	148		Work	85				
Unknown	80		Unknown	n/a		Unknown	224				
<b>Iran</b>	<b>465</b>	<b>6.00%</b>	<b>Iraq</b>	<b>268</b>	<b>2.30%</b>	<b>Poland</b>	<b>1668</b>	<b>5.10%</b>			
Study	255		Study	174		Study	n/a				
Family	94		Family	n/a		Family	480				
Refugee	n/a		Refugee	n/a		Refugee	318				
Work	n/a		Work	n/a		Work	301				
Unknown	n/a		Unknown	n/a		Unknown	508				
Total N	7745	100%	Total N	11,467	100%	Total N	32,794	100%			



**Fig. 10.4** Five overrepresented migrant groups in different industries by gender and residence permit. *Note:* N is the number of observations and S is the share in the sample (the horizontal axis)

residence permit status in Sweden. Figure 10.4 show different ethnic and gender groups within the three industries (on x-axis: N is number of observations for specific ethnic groups, both genders and S are a share of an ethnic group in the total number of employed immigrants in the industry; the y-axis shows the number of observations of immigrants by ethnic group and gender). In the hospitality industry (Fig. 10.4), male immigrants from Turkey, who mostly arrived as refugees or for family reunification reasons, dominate. The group “student male migrants” comprises the largest share of immigrants from the next largest ethnic groups in hospitality (Iraq, Syria, Lebanon and Iran). Surprisingly, we note smaller shares of immigrants employed in hospitality who arrived in Sweden as refugees or for family reunification. A very small share of female immigrants from these countries are employed in hospitality and they arrived in Sweden mainly as students or for family reunification.

Male labour migrants more often work in the construction industry in Sweden (Fig. 10.4). Student migrants from the former Yugoslavia mostly work in Swedish construction. In contrast to the hospitality and construction sectors, immigrants are more balanced by gender in the retail industry. Immigrant students dominate retail.

Overall, our descriptive results indicate that immigrant workers in the service-intensive hospitality sector are overrepresented in jobs requiring hard technical (routine) skills, while native workers in the same sector are more often found in jobs with higher requirements for social skills. Since routine-based technical skills related to machinery operations, monitoring and control are skills highly susceptible to automatization, it adds vulnerability to immigrants’ employment in the hospitality sector.

## DISCUSSION AND CONCLUSIONS

In this chapter we set out to examine why some categories of immigrant workers are more likely to find jobs in hospitality but not in similar low-skilled industries like retail and construction. Using detailed data on the skill characteristics of jobs within the three sectors of hospitality, construction and retail, we probe the extent to which these differences may be driven by differential skill requirements as well as by ethnic sorting into specific jobs and sectors. Our findings suggest that skill-biased change and ethnic segmentation (based on country of birth) provide insights into the patterns of immigrants sorting into jobs and sectors. The fact that mostly native women and immigrant men are employed in hospitality suggests

that more vulnerable groups find employment in this industry. We look deeper into the trend to understand what skills are typically required in hospitality and not in other low-skill industries, finding that immigrants are more often employed in technical skill routine jobs in hospitality. Immigrant men from Turkey and the Middle East have a higher probability to start and be employed in hospitality sector. The hospitality sector also provides jobs for native younger women in jobs requiring social skills even though they commonly earn less than natives in other industries.

After the radical halt of Swedish refugee immigration in 2015 and labour migration on the decline, it is notable to examine the labour market segmentation of migrants occurring during the decades leading up to this shift and what they can mean for the future. The Covid-19 pandemic of 2020 has radically disrupted the working conditions in the hospitality industry with an initial shock of layoffs and workplace closures, a decline in tourism which may be once again on the upturn, and a more long-term shift towards online retail and digital provision of services and food deliveries. Many jobs are moving from in-person service to a background and on-distance work. At the same time, working conditions in hospitality has been noted as unattractive, and employers are struggling to fill vacancies for new positions and (re)recruit staff after the pandemic lockdowns of service establishments have ended. The hospitality sector is a frequent “entry path” for individuals with limited labour market experience and highly dependent on both young workers and migrant workers. The bi-annual work quality surveys conducted by Statistics Sweden notes that hospitality workers are almost twice as likely to experience risks of lay-offs if they complain about working conditions as workers in retail or construction, and four times as likely to work despite being ill for fear of losing their job (Statistics Sweden, 2022). What can we expect in terms of ethnic segmentation of jobs and shifting jobs tasks in the nearby future? On the one hand, one would expect that shortage of service workers would improve wages and working conditions for those applying to such positions. However, the proliferation of non-regulated and illegal workers and low unionization rates among young workers and immigrant workers in hospitality (Bender, 2023, this volume) means that employees bargaining position is much lower than in other industries. The ongoing digitalisation and closure of workplaces after the pandemic may also lead to increased requirements for technical skills for tasks like operating hotel services and customer service desks and systems. These changes do offer potential for immigrants as it can decrease requirements for communication and

language skills, however, these are also positions that can be readily offshored.

Most likely, the ethnic segmentation of labour is likely to persist, but may shift as work tasks and related skill requirements in jobs change and become more technically oriented. In our study, we find the hospitality sector to be ethnically dominated by immigrants from Turkey and Middle Eastern countries, while the construction sector is dominated by immigrants from Poland, showing clear ethnic sorting between industries. While refugees and family migrants from Turkey more often find jobs in hospitality, surprisingly, more students from other Middle Eastern countries are employed there. The construction industry is dominated by Polish and Finnish male workers, which might create barriers for other ethnic groups looking to find jobs in the industry. Similar ethnic sorting of immigrants is also reported in Norway (Friberg & Midtbøen, 2018, 2019) and in the United Kingdom (Ram & Smallbone, 2002; Thiel, 2010; Vershinina et al., 2018). According to labour market segmentation theory, immigrants are more likely to sort into routine technical skills jobs in hospitality based on their human and social capital characteristics, including unrecognised or lower levels of education, or previous work experience in a similar industry. Immigrants are also prevented from sorting into social skill jobs because of poorer host language abilities (Dustmann, 1999). Further, immigrants who enter specific industries and workplaces often refer co-ethnic workers to job openings via their social networks (Andersson et al., 2014). Ethnic labour market segmentation (Noel, 1968; Esser, 2010; Thiel, 2010; Haller et al., 2016) explains why some ethnic groups of immigrants are overrepresented in specific industries or niches. Native workers may be unwilling to take on certain jobs not simply because they generate low pay but also because they confer low status (Leontaridi, 1998). Immigrants, however, may be less picky due to a so-called dual frame of reference and limited options in host-country labour markets (Friberg & Midtbøen, 2018). This willingness will often be interpreted as a sort of skill or “work ethic” (Piore, 1983). Nevertheless, neither labour market segmentation nor skill-biased technological change theories can individually explain the sorting evidence by skill and ethnicity in the low-skilled industries. Thereby, the allocation of immigrants in host-country labour markets is closely linked to processes also defined in literature as categorical inequality (Massey, 2007), with labour market hierarchies tending to reflect the social structure of the societies within which they are embedded (Waldinger & Lichter, 2003). However, this social structure

also opens opportunities for network-based recruitment in labour market segments that are socio-ethnically segregated. Employers might also use their employees as referrals and personal contacts to reduce the costs of finding good matches (Holzer, 1987; Montgomery, 1991). Employees might also be sorted into different firms based on their language skills; in our case, the Polish language might be a working language in some construction companies in Sweden. Because of language similarities, immigrants from Ukraine and other former Soviet Union countries might join the Polish dominance in the construction industry in the future, a trend we also observe in the data in 2012 (the former Soviet Union group is among the largest five groups in the construction sector). Several existing studies (e.g. Wilson & Portes, 1980; Hellerstein & Neumark, 2008) indicate that employers prefer to recruit employees who speak the same language. This implies that immigrants are recruited by firms where fluency in the native language is of less importance or where many of the employees speak one common languages. For front-line service workers in hospitality and retail, language requirements and communication skills are likely to remain imperative.

Policymakers can benefit from this study by considering nuanced sorting of immigrants with different origin background into jobs with social or technical skills in different industries, which might require adjustments in skill formation and education policy interventions for specific groups of immigrants. Further, supporting the skills of immigrants seeking to establish themselves on the job market should consider facilitating the acquisition of language and interpersonal skills in addition to formal training and education. For these purposes, practical job training in service intensive workplaces may be equally important to formal language training. Authorities should also consider the rapid digitalisation of both retail and services, and the opportunities inherent in equipping prospective service sector workers with training in system operations, database and customers support systems, for better access to better jobs in the future.

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## APPENDIX

**Table 10.3** Skills description

<i>O*NET skill</i>	<i>Description</i>
Social skills	Developed capacities used to work with people to achieve goals.
Technical skills	Developed capacities used to design, set-up, operate and correct malfunctions involving application of machines or technological systems.
<b>Social skills</b>	
Negotiation	Bringing others together and trying to reconcile differences.
Persuasion	Persuading others to change their minds or behaviour.
Service orientation	Actively looking for ways to help people.
Social perceptiveness	Being aware of others' reactions and understanding why they react as they do.
<b>Technical skills</b>	
Equipment maintenance	Performing routine maintenance on equipment and determining when and what kind of maintenance is needed.
Installation	Installing equipment, machines, wiring or programmes to meet specifications.
Operation control	Controlling operations of equipment or systems.
Quality control analysis	Conducting tests and inspections of products, services or processes to evaluate quality or performance.
Repairing	Repairing machines or systems using the needed tools.
Troubleshooting	Determining causes of operating errors and deciding how to fix them.

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# Ethnic Discrimination During the Covid-19 Pandemic

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## INTRODUCTION

Ethnic and racial discrimination violates the basic human right to equal opportunity, adopted by the United Nations in the *Universal Declaration of Human Rights* in 1948. Discrimination is a threat to the cohesion of society and leads to the exclusion of some people. To combat discrimination, we must understand its extent, how it manifests, and how it can best

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be counteracted. Such knowledge is even more important during times of crisis since vulnerable people are even more exposed and helpless during difficult periods. The Covid-19 pandemic is one of the most challenging global experiences of humankind in modern history, with severe global health-related (Mallah et al., 2021) and economic consequences (Brodeur et al., 2021), as well as far-reaching effects on most other aspects of our lives (Onyeaka et al., 2021). Some efforts have been made to study how the pandemic has affected ethnic and racial discrimination across various societies. The purpose of this chapter is to provide an overall picture of this evidence.

We concentrate mainly on research that provides conclusive evidence of discrimination during the Covid-19 pandemic. Research results from the labor market, the housing market, as well as other contexts are presented. Our point of departure is the economic theory of discrimination and economic methodologies for measuring discrimination. Therefore, this chapter adopts the economic definition of discrimination. Hence, with ethnic or racial discrimination, we mean differential treatment of a person with an ethnic or a racial minority background even though the person has the same characteristics as a person belonging to the ethnic or racial majority. What is meant by ethnicity or race is a research question in itself. For simplicity, we henceforth only use the term ethnicity to refer to both an ethnic or a racial minority background—regardless of whether a person is first- or second-generation immigrant, Christian or Muslim, Kurdish or Turkish, Black or White, American or European, and so on. We are aware that these differences and nuances certainly matter and are important when studying discrimination. Our focus in this chapter is, however, to analyze the effects of the Covid-19 pandemic on ethnic and racial discrimination in a general sense rather than specific to a certain categorization.

## ECONOMIC THEORIES OF DISCRIMINATION

Why does discrimination exist? Several economic theories have been advanced to explain the phenomenon (Lundahl & Wadensjö, 1984). We focus on three: monopsony, tastes (preferences or prejudice), and statistical discrimination.

### *Monopsony*

The oldest of the theories that concern us here is that of the discriminating monopsonist, developed by Robinson (1932). Assuming that the

monopsonist has a choice between two categories of equally productive labor but with different wage elasticities of supply, in order to maximize profits, he will equal the marginal cost of hiring each category and the total marginal cost obtained by adding the two labor supplies with the demand price of labor. The result is that the group with the highest elasticity receives a higher wage than the other group. If one of the groups is organized, the same conclusions apply. The organized group, offering its labor at a given wage rate, will receive a higher wage than the unorganized group.

The monopsony model offers an analysis of how discrimination works and of its results. The interest in the effects of monopsony is increasing. For a survey, see Manning (2021) and for a study of the relationship between monopsony and the effects of migration on wages, see Amior and Manning (2021). It is likely that monopsony together with other forms of discrimination lead to larger effects than monopsony alone.

### *Taste-Based Discrimination*

The idea of preferences, or tastes for discrimination, was introduced by Becker (1957). Individuals have preferences for making economic transactions with some people but not with others and are prepared to accept an economic loss because of this. Becker expressed tastes by introducing a discrimination coefficient,  $d$ . If the going wage is  $w$ , the discriminating employer acts as if it were equal to  $w(1 + d)$ , where  $wd$  is the non-monetary cost of hiring a particular individual.

This approach works if all employers have the same preferences, but once we allow for different  $d$ 's for different employers, complications arise. In the first place, discrimination will lead to segregation. With two labor categories in society that are perfect substitutes and prejudices against one group, employers with low  $d$ 's will hire the latter group while employers with high  $d$ 's will hire the other group. This will lead to wage rates that tend to be the same for both groups. Discrimination will become unstable. Employers with weaker preferences for discrimination will produce at lower perceived costs and make larger profits than those with stronger preferences, and hence drive the latter out of the market.

Becker analyzed the results of discrimination in a model with two different societies: one white and one black. They produce the same single good with the aid of labor (white and black, respectively) and capital. The latter is mobile between the two sectors and the white economy exports

capital to the black one. Assuming that white capital owners develop a prejudice against black labor, they will reduce capital exports. Black capitalists will make a gain and black workers will lose, due to the lower capital-labor ratio, while white capitalists will lose and white workers gain since this ratio increases in white society. However, this analysis contains a flaw. Preferences for discrimination do not remain constant. What is compared is one situation where no prejudice exists and another where the capitalists are prejudiced against blacks, and this violates one of the fundamental postulates of welfare economics. It is not possible to compare situations with different tastes. The yardstick must remain constant. It can, however, be shown that if tastes are held constant, it may pay for white capitalists to act according to them, provided that the psychic gains are positive and outweigh the monetary losses.

The original Becker formulation identifies white capitalists as the group that possibly discriminates against black workers. When viewed in terms of common sense, this is somewhat puzzling, since capital owners stand to gain from cheap labor. This presumption is borne out once the model is reformulated in purely pecuniary terms, so as to exclude tastes for discrimination. Then white capitalists lose if they withdraw capital from the black sector while the white workers make a gain, since they compete directly against their black counterparts. Thus, we should expect white workers to favor discrimination and white capitalists to be against it. Further, it is much more likely that labor is the mobile factor, rather than capital, so that black and white laborers work side by side in the white economy and discrimination takes the form of a reduction in the number of blacks allowed to enter the latter. Provided that blacks and whites receive the same wage in the white sector, again, white capitalists make a loss while white workers gain.

Discrimination due to taste may also be caused by white worker preferences against working with black workers (or native preferences against working with workers from ethnic minorities). If white and black workers are perfect substitutes, the result may be segregation: white and black workers work in different workplaces. If white and black workers are not perfect substitutes (e.g., have different educations or occupations), the result is wage differences.

A third form of discrimination due to preferences is that consumers may have preferences against black workers and, hence, avoid buying goods and services if the employees are black. It leads to a lower demand for black workers in jobs where the employees have contacts with the



customers and, subsequently, to occupational segregation and lower wages for blacks.

The conclusion to be drawn from the reformulated Becker model, without tastes, is that it is hardly the capitalists/employers who stand to gain from discrimination, but the workers competing with their discriminated colleagues. However, this is hardly a realistic portrait of the situation prevailing in many contemporary societies, where the situation often is that people who can be identified by their ethnicity or religion are excluded when it comes to hiring. Thus, other theories are needed to explain the rationale.

### *Statistical Discrimination*

One such theory is that of statistical discrimination (Phelps, 1972; Arrow, 1973). The point of departure is that employers possess only imperfect information about the productivity of the labor force and, therefore, are forced to base their decisions on proxies, like group membership ('having the same school tie'). One variety of statistical discrimination is based on the use of information on the average productivity of different groups, for instance, information on education. Which school you come from and the level attained could act as a signal of the expected productivity of a job applicant (see Spence, 1974). Persons and groups with a higher expected productivity are hired to a greater extent.

However, some groups display a larger variance than others, which means that the productivity of individual members of these groups may be well below the average and not correspond to the wage that they will receive. This provides an incentive for risk-averse employers to avoid hiring members of certain groups so as to minimize the risk of ending up with 'lemons'; a procedure that will discriminate against group members with average or higher productivity.

## THE EXTENT AND MEASURES OF DISCRIMINATION

Discrimination against ethnic minorities may lead to differences in wages and working conditions as well as to segregation. Many studies have been made of the existence of wage differences and such wage differences are also found. However, the differences are not necessarily proof of discrimination, and discrimination may exist even if no differences are found with such a method. More sophisticated methods are needed. We will discuss

research in this field related to the theories of discrimination, beginning with studies of wage differences and continuing with studies of segregation.

### *Wage Differences*

When studying wage differences with the purpose of comparing the wages of natives and ethnic minorities, it is very important to control for other characteristics, including age, gender, education, and region (van der Meulen Rodgers, 2006). In many cases, a difference is found even after such controls are made. These differences may be due to various forms of discrimination, such as preference-based discrimination, statistical discrimination, or monopsony. Preference-based discrimination and statistical discrimination may force ethnic minorities to accept a lower wage in order to be hired. Monopsony power may induce employers to offer lower wages in a situation where people from ethnic minorities do not have any possibilities to find a better paid job elsewhere.

Wage discrimination and wage differences may not be of the same magnitude across all occupations. Ethnic minorities may not, for example, be discriminated against in some low-qualified occupations but discriminated in others; in other words, there may exist a glass ceiling for ethnic minorities, or, if you like, an occupational wall.

In an economy, such as Sweden, with strong unions and wage negotiations covering most parts of the labor market, it is very likely that the wage differences between employees who have the same occupation or work in the same company are smaller than in countries with weak unions (for a thorough discussion on trade unions and the foreign born in Sweden, see the chapter in this book by Bender, 2023). If there are no or only small differences, the employers have weaker incentives to hire people from ethnic minorities than in economies with larger wage differences. The main differences may instead be found in recruitment behavior, which leads to differences in unemployment and, thereby, also to segregation.

### *Segregation*

To a large extent, ethnic minorities and natives work in different occupations. This is easily seen from labor market statistics. There are several explanations for that. Differences in the type of education and differences in preferences for different types of work and occupations are only two of

them. However, discrimination in the hiring process may also be an explanation. A number of studies of this process have been undertaken.

One frequently used method is for researchers to send fake applications to a large number of vacant positions (Bertrand & Duflo, 2017). In some of the applications the name signals that the person belongs to an ethnic minority, in other applications to the same position the name signals that the applicant belongs to an ethnic majority. Generally, the result is that applicants belonging to the ethnic majority are invited to the company for an interview more often than applicants from an ethnic minority. However, differences do exist between various occupations.

A second method is to let applicants (in practice actors) go to interviews with the hiring firm if they are called and see what happens: do they get a job offer or not and is there any difference depending on if the applicant belongs to an ethnic minority or not (Riach & Rich, 2002)?

A third method is to use vignettes. Studies based on vignettes consist of fictitious cases where participants are asked to reflect on a particular situation as if it were a real one. It is a kind of a thought experiment. An employer taking part in a study gets a number of applications and is asked who would have been invited to an interview if there were a vacant position. There are variations in the characteristics of the applicants presented, one of which is whether they are an ethnic minority or not (Eriksson et al., 2017).

So far, we have only discussed discrimination in the labor market, but there may also be other forms of discrimination, some of which lead to segregation, as in the housing market. Those trying to find an apartment may be discriminated against if they are an ethnic minority. This could be part of the explanation for housing segregation. The same types of methods used to study labor market discrimination have also been used in studies of the housing market (Riach & Rich, 2002; Bertrand & Duflo, 2017). They confirmed that this form of discrimination leads to segregation. Housing segregation may also have indirect effects on labor market discrimination and segregation. Living in an area that displays social problems may lead to discrimination when applying for a job.

Finally, there are many ways of testing for discrimination in the laboratory (Anderson et al., 2006). Laboratory experiments are typically used to test specific hypotheses and to evaluate specific mechanisms related to discrimination. One example is Fershtman and Gneezy (2001), who separated taste-based and statistical discrimination in their analysis.

## COVID-19 PANDEMIC AND ETHNIC DISCRIMINATION

The Covid-19 pandemic may have important implications for discrimination against ethnic minorities in different markets. The pandemic brought a global recession and we know from past research that ethnic and racial gaps in labor market outcomes tend to increase during recessions (Hoynes et al., 2012). We also know that attitudes against ethnic minorities tend to be more hostile during tough times (Isaksen, 2019). Many studies around the world are reporting increased levels of xenophobia, not just against people of Asian descent but also against foreign people with other backgrounds (Elias et al., 2021). In fact, some studies suggest that there are historical linkages between epidemic threats and xenophobia (White, 2020). From the perspective of taste-based discrimination, this suggests that ethnic minorities would face increased labor market discrimination because of animosity during the pandemic.

We know that there were large differences between ethnic minorities and natives with respect to how Covid-19 affected people (Hansson et al., 2020). There are differences between ethnic minorities and natives with respect to the relative risk of contracting Covid-19 and differences in the resulting death rates. These can have important implications for ethnic minorities, including in, for example, the labor market. If employers know that immigrants face higher risks of contracting Covid-19, this may constitute a rational and statistical motivation for not hiring people from ethnic minorities. Statistical discrimination based on the higher risk of contracting Covid-19 may continue, even after the pandemic. Employers may then discriminate statistically against ethnic minorities because of fear of future epidemic outbreaks.

From both the taste-based and the statistical discrimination points of view, we have reasons to suspect that the pandemic might influence the magnitude of discrimination against ethnic minorities. One question is, however, whether there is any evidence of discrimination against ethnic minorities in the first place, before the Covid-19 pandemic. The answer is, yes.

There is ample of evidence of ethnic discrimination against various groups of minorities in the marketplace around the world prior to the Covid-19 pandemic. A large part of this evidence concerns labor and housing market discrimination against African Americans in the United States and against people with Arab-sounding names in European countries. For example, field experiments of labor market discrimination in

Sweden consistently show that job applicants with Arab-sounding names, on average, need to apply for at least 50 percent more available jobs than job applicants with Swedish-sounding names in order to receive similar number of positive responses from employers (Carlsson & Rooth, 2007; Bursell, 2014; Aldén et al., 2021). Similar results exist for the Swedish housing market. Field experiments of housing market discrimination show that people with Arab-sounding names must apply for around twice as many available rental apartments than people with Swedish-sounding names in order to receive a similar number of offers to view an apartment from landlords (Ahmed & Hammarstedt, 2008; Ahmed et al., 2010; Carlsson & Eriksson, 2014).

Hence, there is indisputable evidence of ethnic discrimination in the marketplace prior to the Covid-19 pandemic. For reasons mentioned earlier, ethnic minorities may, however, have faced increased levels of discrimination against them in both the labor and housing markets during the pandemic because of increased levels of crisis-induced animosity and xenophobia and/or statistical inferences concerning how differently Covid-19 affected the minority and majority populations. In the next section, we give some evidence in support of our conjecture.

## EVIDENCE OF PANDEMIC-FUELED DISCRIMINATION

Some empirical studies have investigated the ways in which the Covid-19 pandemic has influenced the scale of ethnic discrimination. We restrict ourselves to discussing studies that sought to test the direct (causal or quasi-causal) impact of Covid-19 on the magnitude of discrimination against ethnic minorities, either through controlled online and field experiments or by exploiting administrative data in the natural experimental setting provided by the pandemic. We begin by reviewing a study that in a general and controlled way established a causal relationship between the Covid-19 pandemic and harmful anti-social behavior. We then review some evidence on how the pandemic affected ethnic discrimination in the labor market. Finally, we discuss some findings related to Covid-19 and ethnic discrimination in the housing market.

### *Covid-19 and Harmful Behavior*

Bartoš et al. (2021) investigated if stimulating the awareness of the pandemic increased hostility in the Czech Republic against foreigners from

the European Union (EU), the United States, and Asia. In a general sense, this study established that crises like Covid-19 can indeed fuel harmful anti-social behavior and discrimination. The investigators conducted a web-based experimental study among a nationally representative sample of 2186 persons in terms of basic demographic characteristics in the Czech Republic during March 30–April 1, 2020. Participants made a series of anonymous decisions in a so-called help-and-harm task that combined elements of the well-known dictator game (Kahneman et al., 1986) and the joy of destruction game (Abbink & Sadrieh, 2009). The dictator game is a two-player game with a dictator and a recipient. The dictator is given an amount of money and an opportunity to share that money with the recipient who has received nothing. This simple game measures pure altruistic behavior of the dictator. The joy of destruction game is also a two-player game where both players are simultaneously given the same amount of money and the opportunity to destroy the other player's money without fear of retaliation.

In the help-and-harm task, participants were instructed to raise, reduce, or do nothing to a predetermined amount of CZK 100 (about EUR 4) that would be given to people with different characteristics. The participants had to actively choose an amount between CZK 0 and 200. This simple experimental task is appealing because any allocation above CZK 100 could be interpreted as pro-social behavior (eliciting financial help) and any allocation below CZK 100 could be interpreted as anti-social behavior (eliciting financial harm). The participants' allocation decisions had no monetary consequences for themselves, which means that selfish motives to harm others could be ruled out. Additionally, the recipient of the money had no strategic or reciprocal role in this situation other than simply receiving the money, which means that statistical discrimination can be ruled out as well so that any differential treatment must be due to taste-based discrimination. The participants made 17 money allocation decisions affecting recipients with various characteristics. In five of these cases, they allocated money to people who they knew were living in the Czech Republic, the EU, the United States, Asia, or Africa. The participants were informed that their decisions were consequential; that is, that some of their decisions would be randomly selected and implemented. They also knew that the decision makers were other people than the recipients.

Bartoš et al. (2021) then used the priming technique (Molden, 2014) to exogenously stimulate pandemic-related thoughts. Participants were

randomized into a control group and a primed group. The primed group of participants answered a set of questions related to the Covid-19 pandemic before proceeding to the help-and-harm task. The pandemic-related questionnaire, which took about 13 minutes to complete, included questions about precautionary health behavior, social distancing, economic situation, and well-being. The questionnaire was designed to stimulate feelings and concerns related to the Covid-19 pandemic. The control group of participants answered the questionnaire after they had completed all their decisions in the help-and-harm task.

The results of this experiment showed that participants allocated less money to foreigners (people from the EU, the United States, Asia, and Africa) than to people from the Czech Republic. Overall, the participants displayed anti-social behavior against foreigners by allocating them CZK 92, less than the default amount of CZK 100, while they displayed pro-social behavior toward people from their own country by allocating them CZK 133. In the control group, participants allocated CZK 134 and CZK 94 to people from the Czech Republic and foreigners, respectively. In the primed group, participants allocated CZK 132 to people from the Czech Republic and CZK 89 to foreigners. Bartoš et al. (2021) concluded that priming participants with a questionnaire related to the Covid-19 pandemic significantly decreased the amounts allocated to foreigners but not to people from their own country. Moreover, the difference in the amounts received by foreigners and people from the Czech Republic was larger when participants were reminded about Covid-19 just before the help-and-harm task. From an economic perspective, these findings can be explained by taste-based discrimination, where favorable feelings toward your own group or derogatory feelings toward other groups may have generated the outcome of the experiment. The observations in this study are less connected with statistical discrimination since the experimental task did not involve any reciprocal motives or any strategic role of the recipients.

### *Covid-19 and Labor Market Discrimination*

Two studies exploited the Covid-19 pandemic to analyze how the extent of discrimination is affected during a time of crisis in a natural experimental setting. The first study was conducted in Germany and examined the firing behavior of firms before and during the Covid-19 pandemic (Auer, 2022). The second study was based on data from the United States and

compared business formation, ownership, and survival before and during the pandemic (Amuedo-Dorantes et al., 2021).

Auer (2022) examined discrimination against people with a migrant background in firing situations during the Covid-19 pandemic. He utilized repeated cross-sectional survey data on forced layoffs and short-time work. The data consisted of 17 waves of pandemic-related information about 11,440 people, representative for the German population in working age, between April and December 2020. Auer (2022) specifically exploited information about employment and demographic background included in these data in his study.

To examine the economic consequences of Covid-19, Auer (2022) restricted his analysis to people who had a job on March 1, 2020; in other words, just before firms started to lay off people because of the pandemic. His main outcome variable of interest was a dummy equal to 1 if respondents reported that they had been laid off since March, regardless of whether they had found another job after that, otherwise 0. Auer (2022) also used an alternative outcome variable, which was equal to 1 if respondents had been in any short-time work situation since March with provisionally reduced work time and pay (to facilitate employment and to avoid unemployment for workers), otherwise 0.

The main independent variable was a dummy equal to 1 if a respondent had a migrant background; that is, if the respondent or at least one of the respondent's parents was born abroad. The data included detailed information about professional education as well as the industry and occupational position of each respondent. Furthermore, the data also included information about respondents' household income, whether they felt under- or overqualified for their job, whether they had a full- or part-time job, and whether the job was temporary or permanent. All this additional information was used for adjustments in the regression analyses.

The data allowed Auer (2022) to examine whether people with migrant background suffered from firing discrimination during the pandemic; in other words, whether, compared to native Germans, they were more likely lose their jobs and less likely to be in a short-time work situation since March 2020, controlling for important factors such as industry, occupation, and time. Finally, Auer (2022) considered the heterogeneous economic effects of the pandemic across different industries and months by using official administrative data on the cumulative monthly numbers of newly registered unemployed people in 2020 relative to 2019.



The results of Auer's study showed that the probability of being laid off was 24 percentage points higher among people with a migrant background than among German natives if a firm's industry- and month-specific unemployment rate increased by 100 percent in 2020 compared to 2019. In contrast, people with a migrant background were 19 percentage points less likely to be in a short-time work situation than native Germans during the same economic shock.

Auer (2022) concluded that firms were significantly more likely to keep native German employees than employees with a migrant background during the Covid-19 pandemic, inflicting further stress on them during a difficult time. He argued that the demonstrated firing discrimination was less likely to be an outcome of statistical inferences about worker productivity since little uncertainty should remain about the latter after they have been observed by employers in the workplace. Therefore, he concluded that firing discrimination is more likely to be a result of employer tastes and animosity against people with a migrant background.

Amuedo-Dorantes et al. (2021) studied discrimination against Asian immigrants in the United States during the Covid-19 pandemic by examining the dynamics of business formation, ownership, and survival. They examined the natural experiment represented by Covid-19 to investigate how discrimination against Asian immigrants may have influenced their self-employment rates. Amuedo-Dorantes et al. argued that an increase in the magnitude of discrimination against Asian immigrants during the Covid-19 pandemic was likely to be a result of a rise in animosity and hostile tastes because of the swift and surprising nature of the pandemic. Statistical inferences about the ability of a group of people are more likely to be based on long-term beliefs and observations rather than on a sudden shock.

Becker's (1957) taste-based discrimination can stem from three actors in the labor market: employers, co-workers, and customers. Amuedo-Dorantes et al. (2021) focused on employer and customer discrimination. First, they hypothesized that employer discrimination against Asian immigrants may lead to higher unemployment among the latter and that it may encourage and push them into self-employment (Clark & Drinkwater, 2000). This may increase the extent of necessity entries of Asian immigrants into self-employment; that is, the transition from unemployment to self-employment, thus raising the business ownership rate among Asian immigrants (Fairlie & Fossen, 2020). Second, they hypothesized that customer discrimination against Asian immigrant business owners may reduce

their sales (Borjas & Bronars, 1989), lower their self-employment rate, lower their business ownership rate, and decrease opportunity entries into self-employment; in other words, a transition from wage employment to self-employment (Fairlie & Fossen, 2020). Finally, they hypothesized that customer discrimination would be a stronger source of discrimination if a decrease in the business ownership rate is observed.

To test their hypotheses, Amuedo-Dorantes et al. (2021) used various data sources. Self-employment and demographic information were accessed from the monthly Current Population Survey for the period between January 2014 and November 2020. They used the longitudinal nature of this data to examine the dynamics of self-employment entries and exits. Furthermore, they collected coronavirus-related data on incidents and death rates from USAFacts database and on non-pharmaceutical interventions from the COVID-19 US State Policies database. The Asian group comprised immigrants while the comparison group consisted of non-Hispanic, native-born, white people.

Using a series of regression analyses, Amuedo-Dorantes et al. (2021) showed that the self-employment rate of Asian immigrants compared to that of non-Hispanic whites was significantly and negatively affected by the Covid-19 pandemic. Self-employment among Asian immigrants fell by 17 percent relative to that of non-Hispanic whites because of the pandemic. This result was robust to various specifications and controls. Remarkably, the magnitude of the pandemic-related decrease in the self-employment rate among Asian immigrants increased once industry controls were included. This means that the disparities between Asian immigrants and non-Hispanic white natives in business ownership could not be explained by industry segregation.

Amuedo-Dorantes et al. (2021) found that the Covid-19 pandemic did not affect Asian immigrants and non-Hispanic whites differently with respect to entries into self-employment. However, when analyzing the necessity and opportunity entries separately, they found that Covid-19 tripled the necessity entries and decreased opportunity entries by 14 percent for Asian immigrants relative to those of non-Hispanic whites. Finally, they found that Covid-19 substantially affected the self-employment exit rates (i.e., transition from self-employment to some other labor-market status, e.g., unemployment or work employment) for Asian immigrants. Relative to non-Hispanic whites, the self-employment exit rate for Asian immigrants increased by more than 60 percent.

Hence, Amuedo-Dorantes et al. (2021) found evidence of increased exit rates, increased necessity entry rates, and decreased opportunity entry rates of self-employment among Asian immigrant people during the Covid-19 pandemic. Altogether, they concluded that their results support the hypotheses of both employer discrimination and customer discrimination. For two other studies on the employment effects of Covid-19 in the United States, see Borjas and Cassidy (2020) and Lee et al., (2021). Both studies indicate negative effects for ethnic groups. It is also in line with what another chapter in the present volume suggests (Bilgili et al., 2023, this volume).

In Sweden, however, the decline in total employment in 2020, the first year of the pandemic, was small, with only a slight decrease in total employment (see Andersson & Wadensjö, 2022a). Results from a register-based study also covering 2021 show a strong positive development of employment in Sweden among those born in Africa and Asia (see Andersson & Wadensjö, 2022b). It is a bit surprising that the employment of foreign-born employees increased, especially those born in Africa and Asia (the most positive development is found for those born in Afghanistan). One explanation may be that they work in sectors and occupations where the demand for labor increased during the pandemic. Another explanation could be the different ways in which the Covid-19 pandemic was managed in Sweden compared to most other countries. The results do not support the hypothesis that discrimination against foreign-born people increased during the pandemic in Sweden despite high segregation by industry.

### *Covid-19 and Housing Market Discrimination*

One online thought experiment among participants from the United States (Lu et al., 2021) and one field experiment in the Belgian rental housing market (Verhaeghe & Ghekiere, 2021) suggest that the Covid-19 pandemic also may affect ethnic discrimination in the housing market. Lu et al. (2021) conducted an online vignette experiment to examine whether priming Covid-19 salience increased discrimination against Asians and Hispanics in the United States. Specifically, they examined whether making participants temporarily think about how Covid-19 affected their lives had any impact on the magnitude of discrimination against hypothetical roommates from different backgrounds. They conducted the study in August 2020 among a nationally representative sample of 5000 American adults. In the vignette experiment, they asked participants to imagine that

they were looking for a roommate and that, for this purpose, they had posted an advertisement about room availability on a popular online housing platform. The participants were then given a supposed e-mail response from a prospective roommate. The ethnicity of this prospective roommate was randomly varied by assigning a name with a distinctive ethnic connotation: white, black, Hispanic, East Asian, or South Asian. After the hypothetical case, the participants answered two questions that elicited how likely they thought it would be that they would contact the prospective roommate in that situation. Another four questions measured the participants' views about the hypothetical roommate related to responsibility, courteousness, financial stability, and cultural compatibility. In other words, the first set of questions measured discriminatory intent while the second measured both prejudices and stereotypical beliefs.

The participants were randomly assigned to a control group or a primed group. For the primed group, the online survey started with some current information and a battery of questions about the Covid-19 pandemic, priming Covid-19 salience before they made the hypothetical roommate experiment. For the control group, the online survey started with the experimental part and ended with the Covid-19 pandemic information and questions.

The findings of Lu et al. (2021) showed that priming Covid-19 pandemic salience increased not just the discriminatory intent but also the prejudices and stereotypes against hypothetical Asian and Hispanic roommates. For example, their results indicated that participants in the primed group were 7, 4, and 6 percentage points more likely than participants in the control group to report that they were strongly disinclined to reply to a hypothetical Hispanic, South Asian, and East Asian prospective roommate, respectively. In contrast to the studies discussed earlier, this study also provides some evidence of increased statistical discrimination. For example, participants in the primed group were more likely than participants in the control group to believe that both East Asian and South Asian people are extremely irresponsible and that Hispanic and South Asian people are financially unstable. Actions based on both these beliefs would constitute statistical discrimination.

Verhaeghe and Ghekiere (2021) conducted a field experiment in the housing market in a metropolitan city in Belgium. They sent out 500 matched inquiries before the outbreak and another 500 after the outbreak of Covid-19 to landlords with available rental apartments. In the inquiries, the fictitious tenants asked landlords whether they could visit the available

dwelling. The fictitious inquiries were sent through e-mails and tenant ethnicity was signaled through distinctive ethnic names: Belgian-, Congolese-, and Maghrebian-sounding names. One of the matched pair of tenants always had a Belgian-sounding name while the name for the other tenant was randomly Congolese- or Maghrebian-sounding. Verhaeghe and Ghekiere then examined whether applicants of Maghrebian and Congolese origin were discriminated against in comparison to applicants with Belgian origin with respect to landlord positive response rates. They found that the relative net discrimination against Maghrebian applicants increased during the pandemic from 20 to 36 percent. However, they also found that the net rate of discrimination against Congolese candidates decreased from 17 to 6 percent. They provided a few cautious explanations to their mixed findings. One important explanation is that the Congolese minority in Belgium relative to the Maghrebian one is a lot smaller and, therefore, constitutes less of a threat or perceived competition among predominantly Belgian landlords. Another explanation is that the media in Belgium highlighted the potential higher occurrence of Covid-19 among Maghrebian and Turkish people. They, therefore, suggest that the effect of the pandemic on the magnitude of discrimination varied across different immigrant groups depending on specific circumstances.

## DISCUSSION AND POLICY RECOMMENDATIONS

Covid-19 affected everybody. At first, it was argued that the pandemic, to some extent, would be an equalizer that could reduce inequalities in society since it randomly affected both rich and poor, young and old, men and women, as well as natives and foreigners. We know that this was not actually the case. For example, Covid-19 has, without a doubt, been deadliest for the senior population. We also know that people with lower earnings on average were affected more negatively by Covid-19 and that ethnicity is important to consider, since ethnic minorities are usually overrepresented in lower-income occupations. Some ethnic minorities were also more likely to have occupations in job sectors where they were less likely to be able to work from home. Hence, the origin of Covid-19 was a medical matter, but its scope was societal.

Covid-19 struck ethnic minorities a lot harder than natives. Consider the case of Sweden. According to a report from the Public Health Agency in Sweden, some foreign-born groups had a higher risk of being infected with the virus than the Swedish-born population during the period

between March 2020 and February 2021, measured as the number of confirmed cases (Public Health Agency in Sweden, 2021). More importantly, almost all foreign-born groups faced a higher risk of ending up in intensive care units than Swedish-born people. For example, people born in Africa or in the Middle East were five times more likely to need intensive care than people born in Sweden. The relative risk of dying because of Covid-19 was also higher for people born abroad in comparison to those born in Sweden. People born in Africa and in the Middle East, for example, were at three times greater risk of dying from Covid-19 than Swedish-born people. These are considerable differences and clearly show that the pandemic affected ethnic minorities differently. Similar observations are also made in other countries. Note, however, that mortality rates for diagnoses other than Covid-19 was lower for ethnic minorities (measured by country of birth) compared to native Swedes according to a study using logistic regressions (see Drefahl et al., 2020). Excess mortality may be a better measure for comparing the development of mortality across ethnic and native individuals.

Similar findings are documented by examining excess mortality in Sweden among people born in different parts of the world during a three-month period (March–May 2020) of the pandemic (Hansson et al., 2020). It shows that people born in Somalia, Syria, and Iraq had significantly higher excess mortality rates than Swedish-born people. For example, excess mortality during the period in focus, compared to 2016–2019, among middle-aged (40–46 years old) people born in Somalia, Syria, and Iraq was about 220 percent. The corresponding percentage for middle-aged people born in Sweden, the EU, the Nordic countries, or North America was minus 1 percent.

Hansson et al. (2020) provide an explanation of why there are large differences between ethnic minority groups and natives in how Covid-19 affected them. They argue that segregation is an important contributor. Ethnic minorities are overrepresented in densely populated areas and the number of people living in a household is higher among ethnic minorities than among natives. Moreover, it is more common among ethnic minorities that relatives take care of their elderly than among natives. Longer commuting distances and dependence on the public transport are other factors affecting the relative risk of contracting Covid-19. Hence, a number of aspects that originate in lower socioeconomic status, segregation, and past discrimination, may, in different ways, explain why Covid-19 affected various vulnerable populations. Thus, strategies adopted to

combat Covid-19 were often criticized for being designed with respect to a homogeneous majority society without considering existing inequalities among people (Hansson & Jakobsson, 2020). From a sociological perspective, this could constitute a form of ‘institutional’ or ‘structural’ discrimination (Small & Pager, 2020). The idea behind these concepts is that something other than discriminating individuals (as in economic theories of discrimination) is responsible for ethnic or racial disparities in society.

The high incidence of Covid-19 among the foreign born in Sweden is not combined with a negative development in the labor market. On the contrary, the employment development was more positive among the foreign born than among those born in Sweden. However, the foreign born still have a lower employment rate than the Swedish-born and discrimination may be a factor behind this difference.

One group facing a difficult situation in the labor market is unaccompanied minors (see, e.g., Çelikaksoy & Wadensjö, 2017). There are large differences among those belonging to this group: those arriving at a younger age, boys, those living in the Stockholm area, and those coming from Afghanistan are employed to a higher extent than other unaccompanied minors. It is important to follow what happened with this group during the pandemic years. Additionally, it is also important to follow the development of the many unaccompanied minors who arrived from Ukraine in 2022 following the Russian invasion.

In this chapter, we have concentrated on analyzing the effects of the Covid-19 pandemic on discrimination against ethnic minorities. However, we must remember that there are also other vulnerable groups of people in society that, much like ethnic minorities, may have faced increased levels of discriminations during the Covid-19 pandemic. We know, for example, from field experimental studies that people are discriminated against because of their age (Ahmed et al., 2012; Carlsson & Eriksson, 2019), disability (Ameri et al., 2018; Bjørnshagen & Ugreninov, 2021), sexual orientation (Weichselbaumer, 2003; Ahmed et al., 2013), and gender identity (Granberg et al., 2020; Ahmed et al., 2021) in the labor market. Indeed, several scholars highlight the potential risks of amplified disadvantages of the elderly (Shakespeare et al., 2021), LGBT people (Mattei et al., 2021), and disabled people (Swift & Chasteen, 2021) during a crisis like Covid-19.

The policy implications may differ between countries. Some countries may have had increased discrimination against ethnic groups during the

pandemic, others not. Hence, it is important for further research to investigate the effects of Covid-19 on labor market discrimination and segregation.

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## Model Minority and Honorary White? Structural and Individual Accounts on Being Asian in Sweden

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*and Aliaksei Kazlou* 

When I hear the phrase “Asians are next in line to be white,” I replace the word “white” with “disappear.” Asians are next in line to disappear. We are reputed to be so accomplished, and so law-abiding, we will disappear into this country’s amnesiac fog. We will not be the power but become absorbed by power, not share the power of whites but be stooges to a white ideology that exploited our ancestors. This country insists that our racial identity is beside the point, that it has nothing to do with being bullied, or passed over for promotion, or cut off every time we talk. Our race has nothing to do

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with this country, even, which is why we're often listed as "Other" in polls and why we're hard to find in racial breakdowns on reported rape or workplace discrimination or domestic abuse. *Minor Feelings* (Hong, 2020)

## INTRODUCTION

With the Covid-19 pandemic, persons racialized as Asians, especially East Asians, experienced increased racial harassment and tensions (Chen & Wu, 2021; Bilgili et al., 2023, this volume). For example, in the United States, it was reported that in the first quarter of 2021, hate crimes against Asians increased by more than 300% compared to the first quarter of 2020 (CSUSB, 2021). At the start of the Covid-19 pandemic, the "I am not a virus" campaign emerged in France (Pailliez & Cotton, 2020). The hashtag #StopAsianHate gained traction on the social media platform Twitter. Even in Sweden, during Covid-19, implicitly racially charged expressions increased. Although Swedish statistics on hate crimes do not differentiate Asians in Sweden as a targeted population, the report of hate crimes in 2020 mentions Asians and their exposure to hate crimes in relation to the Covid-19 pandemic (Stendahl, 2021); the first time this population is specifically called out as a target of racially charged incidents in this report.

In contemporary Sweden, characterized by racial and ethnic diversity, discussions about the success and failures of migration and integration are the subject of regular political and social debates. Researchers are paying specific attention to racial discrimination and inequity in Sweden, especially on anti-Black racism (Wolgast et al., 2018; Wolgast & Wolgast, 2021). In addition to the Black Lives Matter movement in Sweden, there is a heightened racial awareness in Sweden. For example, Landsrådet för Sveriges ungdomsorganisationer (LSU—the National Council for Swedish Youth Organisations) launched an anti-racism video series called "Non-White-White Talk Show," which consists of five episodes focusing on anti-Black, anti-Sami, anti-Semitism, anti-Romani, and anti-Muslim (LSU, 2022). The Swedish government has decided on five action programs against various forms of racism for the period 2022–2024 for the above-mentioned groups as well. These programs are important toward a more equitable society (Regeringen, 2022). However, there is one group that is consistently invisible from this anti-racist political, social, and research arena: Asians.

The number of immigrants from Asian countries has increased significantly since the 1970s. Immigration from Asian countries escalated following the 2008 labor migration law reform, which gave individual employers autonomy to recruit and employ people from outside EU countries. The number of persons with Asian citizenships residing in Sweden increased from around 4500 in 1974 to 106,000 in 2022. China, India, and Pakistan are among the top ten countries of origin for individuals immigrating to Sweden. Despite their increasing physical presence, only a few studies specifically address the experiences of Asians in Sweden (e.g., Osanami Törngren, 2020; Hübinette, 2021). Further, a systematic analysis on the socioeconomic status and outcomes of Asians in Sweden is absent.

This chapter tackles the “narrative scarcity” (Lee & Ramakrishnan, 2021) of Asians in Sweden. The fact that 70% of Asians in Sweden today are in fact first-generation immigrants underscores the urgency of this contribution. We define Asians in Sweden as people of South, East, and Southeast Asian origins in Sweden, which includes persons who are foreign-born immigrants, the native-born children of these individuals, and further generations.<sup>1</sup> In order to explore the role of early acculturation and network building, we split the foreign-born into two groups: those who migrated at or before the age of 13 and those who migrated thereafter. We conduct statistical analysis of register data from 2012 to describe the educational attainment and employment situation of Asians in Sweden. This chapter is a first step in mapping out and understanding the ethnic and racial positions of Asians in Sweden, an attempt to ensure that Asians in Sweden do not “disappear” in the otherwise monolithic understandings of immigrants and natives.

### ‘ASIANS’ IN SWEDEN

Although Sweden lacks statistics on self-identified ethnicity and racial identity, a unique set of statistics covering the total population of Sweden, includes information on the country of birth, citizenship, and migration status, is however, available. In the United States though, analysis based

<sup>1</sup>Note that, in Swedish administrative data, only the country of birth of the parents of native-born people is registered and not that of the grandparents. In other words, we can only identify Asians among the children of foreign-born Asians or the so-called first-generation migrants and not among subsequent generations.

on racial identification on census can give detailed accounts on experiences of those who identify as Asian as a whole, while the heterogeneity of the group based on different national and ethnic origin is harder to capture (Lee & Ramakrishnan, 2021). The Swedish statistics, on the other hand, can give a detailed account on the heterogeneity of individuals who may be racialized as Asians based on national origins. However, since we assign Asian racial and ethnic identification based on the countries of birth (of the individuals and their parents), there is a risk that this information might not correspond to their true ethnic and racial self-identification.

In this chapter, we define Asians in Sweden as people with origins in South, East, and Southeast Asia.<sup>2</sup> This includes all individuals who were born in the Asian regions and those individuals who are born in Sweden with one or two parents born in South, East, or Southeast Asia.

Asians are one of the fastest growing immigrant groups in Sweden, accelerated by the 2008 Labor Migration Law Reform (Riksdagen, 2008). Prior to 2008, immigration from non-EU countries was predominantly limited to refugee migration and family reunification. According to 2020 statistics, there are a total of 332,210 Asians in Sweden, comprising about 3.4% of the total Swedish population.<sup>3</sup> Among Asians, 70% are first generation, 10% are second generation, and 20% are mixed. When we look at the gender ratio for the first generation, we see that Southeast Asians are predominantly female (Table 12.1).

**Table 12.1** Share of women and men among Asians in Sweden by region of origin, 2020 (%)

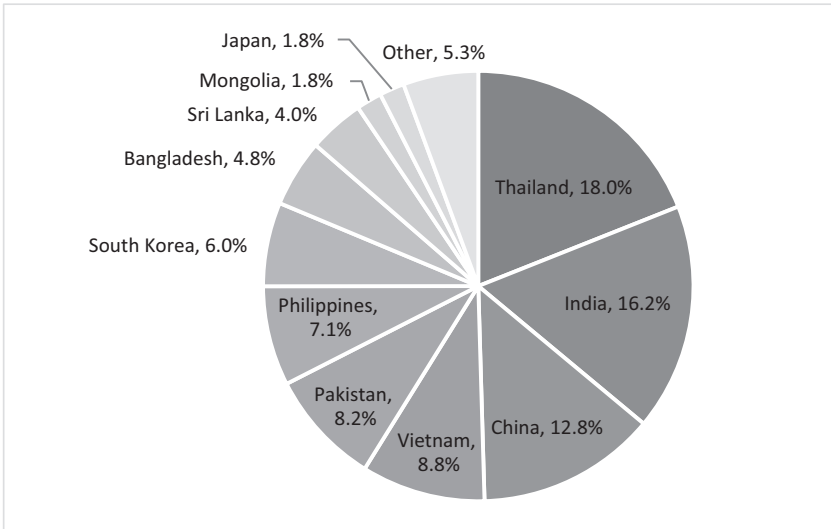
	<i>Women</i>	<i>Men</i>	<i>Total</i>
East Asian	59.8	40.2	25.3
South Asian	45.1	54.9	36.4
Southeast Asian	70.5	29.5	38.3
Total	58.6	41.4	100

*Source:* SCB Statistic Database (2020), compiled by authors.

<sup>2</sup> Countries of origin we include in our definition are, for East Asia: China, Hong Kong, Japan, South Korea, North Korea, Mongolia, and Taiwan; South Asia: Nepal, Bangladesh, India, Pakistan, Sri Lanka, and Bhutan; and Southeast Asia: Indonesia, Thailand, Malaysia, Myanmar, Vietnam, Laos, Cambodia, Philippines, and Singapore.

<sup>3</sup> Since Sweden does not collect self-reported ethnic and racial categories, these numbers are based on the countries of origin and should be considered as an approximate estimate.





**Fig. 12.1** Asian nationalities in Sweden, by country of birth, 2020. *Source:* SCB Statistic Database (2020), compiled by authors

Among Asians, those with origins in Thailand are the largest single group (19%), followed by India (17%), China (14%), Vietnam (9%), Pakistan (9%), Philippines (8%), South Korea (6%), Bangladesh (5%), and Sri Lanka (4%). As of 2020, these nine countries account for 90% of the Asian population in Sweden (SCB Statistic Database, 2020) (Fig. 12.1).

The Asian diaspora is quite diverse—Asians are a mix of people, including persons with backgrounds from countries with differing economic status. Asians represents people with all possible immigration backgrounds, from refugees, labor migrants, marriage migrants, to transnational adoptees—each trait may significantly affect not just their socioeconomic positions but also the path to integration in Swedish society. This is not unique to Sweden, rather it reflects the experience of Asian diaspora across the West. It is why stereotypes and perceptions of Asians may positively and negatively affect individual lives. As mentioned earlier, 70% of the Asian population in Sweden are first-generation immigrants. Among these first-generation Asians, 45% of those who were born in Vietnam, 68% in South Korea, and 63% in Sri Lanka, have been residing in Sweden for over

20 years, while other groups are predominantly newly arrived within the last 5 years (SCB Statistic Database, 2020).

In this chapter, we specifically focus on the top 10 countries of origin, which comprise 90% of the Asian population. These are people with origins in Thailand, India, China, Vietnam, Pakistan, Philippines, Republic of Korea, Bangladesh, Sri Lanka, and Japan.<sup>4</sup> Between 2010 and 2012, a large majority of the Asians newly arriving in Sweden from these countries were in three categories: family migrants, labor migrants, or students.<sup>5</sup> Compared to immigrants arriving from the Middle East or Africa, only a very small portion of Asians sought international protection in Sweden.<sup>6</sup> Between 2010 and 2012, more than half of all South Koreans and about one-third of Chinese, Japanese, Bangladeshi, and Pakistanis moving to Sweden arrived as students. More than half of the people from India and Thailand, as well as one-third of those coming from Japan, Bangladesh, and China, entered Sweden as labor migrants. Finally, about two-thirds of the people coming from the Philippines, more than half of those from Vietnam and Sri Lanka, and one-third of the Thai migrated under a family unification/reunification program. Most of the “other” categories are those who received a visitor’s permit.<sup>7</sup> These differences are important for understanding the socioeconomic position of Asians in Sweden (Fig. 12.2).

### WHY IS IT INTERESTING TO FOCUS ON ASIANS IN SWEDEN?

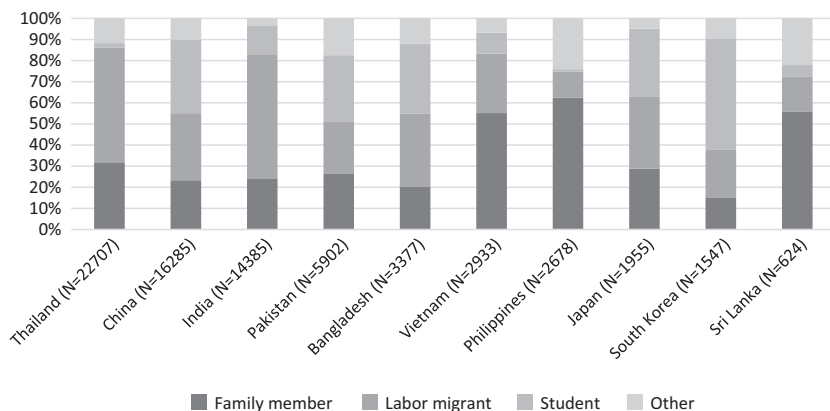
Asians are increasingly visible both in numbers and across media in Swedish society. The Covid-19 pandemic indeed brought the problem of anti-Asian racism to the Swedish public sphere, albeit temporary. Swedish media, including radio, television, and newspapers, reported on Asians in Sweden being targets of anti-Asian racism (e.g., SVT, 2020). The

<sup>4</sup>Data for Mongolians was not available in the 2012 data we analyze. Mongolians and Japanese citizens are proportionally the same size.

<sup>5</sup>The figures include residence permits and residence rights granted by both the Swedish Migration Board and Swedish embassies abroad. The figures only reflect first-time decisions. Persons who have had a residence permit or right of residence and are granted an extension of this are excluded. Therefore, the actual number of Asians with residency permits is expected to be larger than what the figures show.

<sup>6</sup>Between 2010 and 2012, approximately 2.5% of the residency permit issued to Pakistanis and 4.5% to Sri Lankans were on the grounds of international protection. For Indians, this number is 1%; it is 2% for Bangladeshis and Vietnamese.

<sup>7</sup>Permits allowing individuals to stay in the Schengen zone for more than 90 days.



**Fig. 12.2** Total number of residency permit issued in the period 2010–2012 (%). *Source:* Migrationsverket (2022), compiled by authors

heightened awareness also led to a wider discussion on anti-Asian racism in Sweden, including, among others, public broadcasting service producing special episodes on racism against Asians (UR, 2021).

However, there are very few studies in Sweden focusing on Asians and we do not know much about their positions in Swedish society. Existing studies include historical accounts of Asian immigration to Sweden (Yamasaki, 1996; Kjellgren, 2001), Asian representation (Hübinette & Tigervall, 2012), Vietnamese and Karen refugees (Rönqvist, 2009; Suter & Magnusson, 2015; Suter, 2021) the experiences of East Asian adoptees in Sweden (Hübinette & Tigervall, 2008; Lindblad & Signell, 2008; Hübinette & Tigervall, 2009), and Asian marriage migrants (Hedman, 2009; Hedman et al., 2009; Averås, 2013; Kieu, 2020).

Historically and contemporary, Asians encompass both the colonizer and the colonized. In the past decades, its countries not only are exploited but also contribute and engage in new forms of colonization through economic strength. This unique position is also reflected in the contradictory, yet coexisting, images of Asians held by the West. Especially East Asians, who simultaneously represent “yellow peril” and the “model minority.” Yellow peril, an irrational fear of Oriental conquest, originates from the European imagination as early as the fifth century and implies a notion of threat. In contrast, the idea of model minority is a more contemporary idea that affirms the status quo and assimilation of Asians in a host

society. The model minority myth suggests compatibility between key elements of Asian and European cultures, such as being hardworking (Okiihiro, 1994; Tuan, 1998; Wu, 2002). The images of the model minority and the compatibility of Asians are present in Sweden as well. The crime rate is reported to be lower compared to other immigrant groups, at the same level as individuals with two Swedish-born parents (Martens, 2005). Additionally, supposedly “positive” images of Asians as “good immigrants,” filled with images such as “hard-working” and “good at school” flourish (Lindh, 2020). A survey conducted by EXPO<sup>8</sup> shows that respondents are more positive toward Asians than Middle Easterners or Africans (Aarnivaara, 2022).

However, Asians also experience not just racism and discrimination but also gendered stereotypes. Typically, Asian women are sexualized and men are asexualized (Lindh, 2020). These experiences are reflected in our previous research (Osanami Törngren, 2011, 2020; Emilsson et al., 2014), where accounts of experiences with microaggressions, discrimination, and sexualization are documented. High-skilled Asian migrants and mixed Asians experience daily racialization and microaggressions, which are often dismissed as “positive” stereotypes (Emilsson et al., 2014; Osanami Törngren, 2020; Osanami Törngren 2022). This research indicates the majority society’s perception that East Asians are not well integrated into Swedish society, but that they find the lack of integration acceptable because Asians are self-sustainable, not making trouble, and considered hard-working. While Swedes report positive images of Asians and sympathize with why Asians want to self-segregate, Asians are also not as preferred as marriage partners (Osanami Törngren, 2011).

The idea of yellow peril emerged and spread at the end of the nineteenth century in Sweden. Viktor Rydberg, a well-known writer, member of the Swedish Academy, and professor of culture and art history, was among the proponents of the idea of an economic war of life and death between the White race and the “yellow” one (Jacobsson & Bruchfeld, 1999; Lundberg, 2004). The resulting images have persisted throughout the pandemic, remaining in focus with the ongoing political turmoil between China and the West. While Asian immigrants and their descendants are seen as model minorities, Asia itself is seen as a threat,

<sup>8</sup> Nondenominational and nonpartisan foundation which monitors society and engages in journalistic output on topics related to racism in Sweden.

economically and politically, especially in times of Covid-19 and the political situation with China, which creates tensions. Even in Sweden “Eating bats” and “Do you dare to take the Chinese vaccine?” (Utrikesbyrå, 2020a, 2020b), and “Chinese threats” are recurring headings in Swedish news. The globally circulated images of China are converging, confounded with populations that might be racially and ethnically Asian but not necessarily Chinese. Consequently, Asians are increasingly vulnerable to expressions of racial hate in many different countries.

Kim (1999, p. 106), specifically looking at Asian American experiences, stresses the importance of addressing racialization process as mutually constitutive of one another:

Asian Americans have not been racialized in a vacuum, isolated from other groups; to the contrary, Asian Americans have been racialized relative to and through interaction with Whites and Blacks.

Asians occupy the “racial middle” position (Bonilla-Silva, 2004). Kim suggests an understanding of race relations based on the idea of racial triangulation and racial positions through two distinct processes, “relative valorization” and “civic ostracism.” Relative valorization refers to the process where the dominant group (native-born White Americans) valorizes one subordinate group (Asians) relative to other minority groups, typically Black Americans, in order to maintain the racial hierarchy. Civic ostracism refers to the process where the dominant group (native-born White American) constructs a minority group (Asians) as distinctively different from the dominant group. In this mechanism of racial triangulation, model minority images and myth are effectively used not only to stereotype Asians but also to keep other minorities down; simultaneously, the image of yellow peril also puts Asians as not quite “White” and “majority.”

Tawa et al. (2013) further specifies this triangulation of how Black and Asians in the United States are positioned in relation to each other through myths of “meritocracy” and “nativity.” In relation to other minorities, Asians are constructed as a group with “merit-based power,” having achieved economic and educational levels close to Whites, however, Asians are only “similar” to Whites. Research shows that there are large socioeconomic disparities between different ethnic groups within Asian Americans. Further, Asian Americans also face significant racism and discrimination in the labor market (e.g., Chin, 2020). While Asians may be racially

positioned higher relative to the Black American population due to the idea of meritocracy, research shows that Black Americans are perceived as being more “American” and native, thus having “native-based power.” How individuals are positioned in this mechanism of triangulation and how society maintains hierarchy shapes not only the perceptions and structures that the majority population uphold but also minority populations and perceptions of self, which may lead to internalized racisms and oppressions, which can be understood as

the individual inculcation of the racist stereotypes, values, images, and ideologies perpetuated by the White dominant society about one’s own racial group, leading to feelings of self-doubt, disgust, and disrespect for one’s race and/or oneself. (Pyke, 2010, p. 553)

In this chapter, we take the starting point of the above understanding of racial triangulation as a theoretical perspective in exploring where Asians stand in Swedish society. In the Swedish context, we should understand the racial triangulation of Asians in relation to native-born Swedes, as the dominant group, and other racial minorities, including Middle Eastern Swedes and Afro-Swedes. In a society as diverse as Sweden, when immigrant integration is seen as “a two-way process involving immigrants’ receptiveness to the structures, systems, and norms of a host society and the host society’s own engagement toward the immigrants” (Lerpold et al., 2023, p. 8), it becomes crucial to understand the complexity of racial positions between minority groups. For example, it has been clear during the pandemic that the perpetrators of anti-Asian hate crimes and incidents can be by both minority and majority backgrounds.

While Asians in Sweden are invisible from public and political debates on integration, the demand for assimilation and integration is often forced on other immigrant groups in Sweden that are considered a problem and a threat, especially Middle Easterners and immigrants of Islamic background. This can be empirically examined through the perspective of racial triangulation. In this chapter, we do not examine the personal experiences that inform discrimination, racism, and internalized racial positions, but we do try to unpack the myth of the model minority and understand the mechanism of racial triangulation, nativity-based power, and meritocracy-based power that forms the positions of Asians by systematically analyzing the socioeconomic positions. As populations of Asians in Sweden grow, whether the group constitutes a meaningful social and

political category becomes increasingly important. This chapter is a first step in identifying the socioeconomic experiences of the heterogeneous Asian population in Sweden, which may form or divide the Asian experiences and identity.

## SOCIOECONOMIC POSITION OF ASIANS IN SWEDEN

As introduced earlier, there are a handful of qualitative studies examining experiences of specific Asian immigrant groups, however, there is a scarcity of statistical overviews and analysis comparing different Asian groups in Sweden, including in relation to other immigrants. In order to contribute to the development of this literature, in this section, we use STATIV register data from 2012 to present a descriptive overview of the socioeconomic status of Asians in Sweden before the Covid-19 pandemic. These data should be understood as a snapshot of Sweden in 2012, trends in the migration and integration of Asians as defined in this chapter, and as a first step in systematically understanding the socioeconomic position of Asians in Sweden. Due to the changing migration regulations and the steadily increasing stock of Asian population in Sweden, there is a need to follow-up the analysis regularly, exploiting longitudinally updated data as well as consider the impact of the pandemic.

### *Data and Variables*

STATIV is a longitudinal database for integration studies that contains information on all individuals residing in Sweden. This information includes socioeconomic and demographic variables, including those indicating every individual's country of origin. Everyone has a unique anonymous identifier that can be linked to that of their spouse and their parents. In the absence of self-reported data on race or ethnicity in official statistical sources in Sweden, we use these variables as proxies for ethnicity.

Socioeconomic status is measured by looking at the levels of education, employment rates, occupational level, and education to job match. Two of these variables require further explanation. The original variable describing occupational level (SSYK3) includes nine occupational levels from managers to elementary occupations. This variable is then recoded into "Job qualification" by classifying the nine occupational levels into four groups according to the average required qualifications for each occupation. This classification is based on the International Standard Classification

of Occupations (ISCO) and the STATIV documentation provided by Statistics Sweden. Finally, a third variable is computed based on “Job qualification” to include only occupations that require the highest level of qualifications, namely, managers and professionals (“High-skilled jobs”).

The quality of employment can also be described by looking at how a person’s education matches the skill requirements of his or her job (see Dahlstedt, 2011; Irastorza & Bevelander, 2017; Kazlou & Wennberg, 2023, this volume). To compute the variable education to job match, we first recoded the original variables on describing highest achieved level of education by using the same grouping of four levels of qualifications/education as we did for “Job qualification.” We then matched these two variables to obtain a three-category variable: overqualified for the occupational level, underqualified for the occupational level, or right match between occupational level and education.

In the analysis, we look at the top 10 Asian groups<sup>9</sup> and compare them with the two major immigrant groups in 2012 of European (Finland and Poland), Middle Eastern (Iraq and Iran), African (Somalia and Eritrea), and North America/Oceania (United States, Canada, and Australia) origins in order to understand whether there are common experiences among Asians as a whole and how they relate to the outcomes of other groups. We look at socioeconomic outcomes across the so-called generations by dividing the foreign-born population into those who migrated to Sweden before versus after the age of 13,<sup>10</sup> and Asians who are born in Sweden with two parents originating from selected Asian countries.<sup>11</sup> Analysis on these three distinct groups will infer how time spent in Sweden may change socioeconomic positions.

### *University Education*

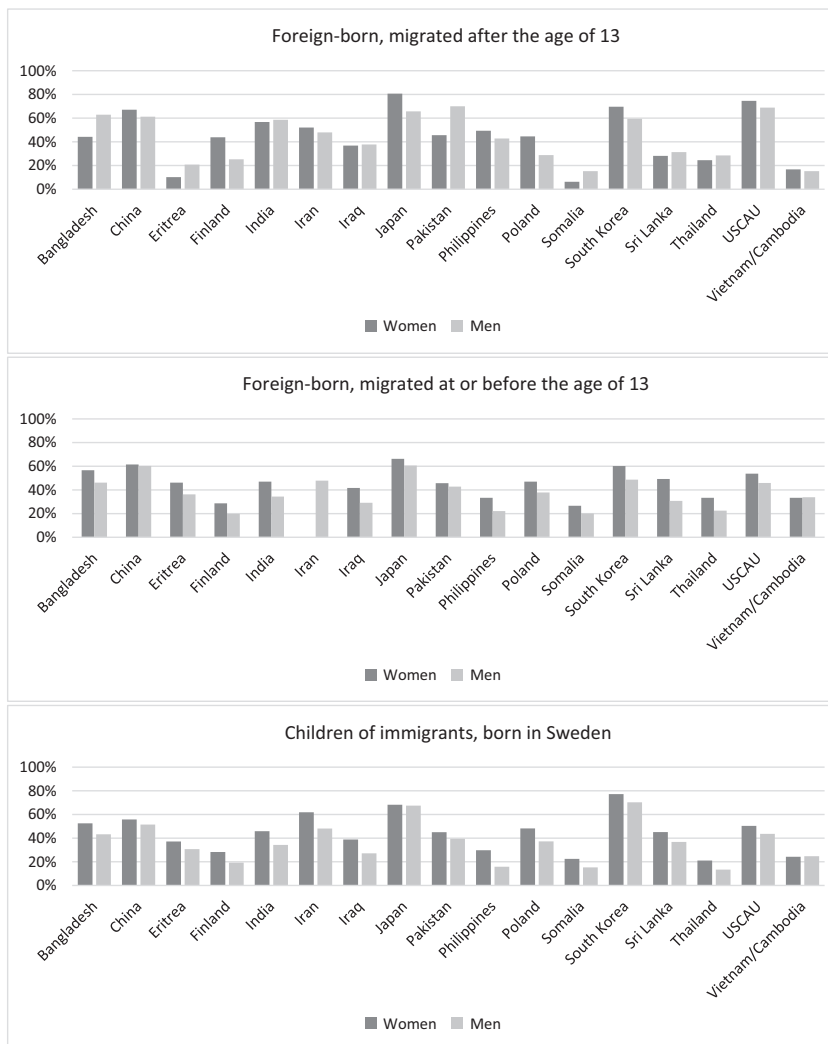
The three panels in Fig. 12.3 depict the share of university graduates among Asians and seven other nationalities in Sweden across the generations selected for this analysis. The figure shows, across generations analyzed and represented in consecutive panels within Fig. 12.3, that East

<sup>9</sup>In the data that we analyze, Vietnam and Cambodia are clumped as one group.

<sup>10</sup>Asians migrating before the age of 13 may include persons who are transnationally adopted.

<sup>11</sup>For some nationalities, the number of those who are born in Sweden is small (the smallest being Japanese  $N = 84$  and South Korean  $N = 131$ ). Thus, the results should be interpreted carefully.





**Fig. 12.3** Share of people with tertiary education aged 25–60 in Sweden by major nationalities, 2012. *Note:* data are missing for Iranian women who migrated before the age of 13

Asians (Japan, China, South Korea) and South Asians (India plus men from Pakistan and Bangladesh) have the highest share of people with university education. This might not be surprising as many East Asians and South Asians enter Sweden with student permits or for labor market reasons. Among non-Asian nationalities, people from the United States, Canada, and Australia (USCAU) have the highest share of university graduates.

Among the foreign-born Asian groups who migrated to Sweden after the age of 13, Southeast Asians (people with origins in Vietnam/Cambodia, Thailand, and Sri Lanka) are among those with the lowest share of university graduates. These are groups that predominantly migrate to Sweden for family reasons. While people with origins in Vietnam/Cambodia, Thailand, and Philippines also show lower share of higher educated people in further generations, the proportion Sri Lankan women with higher education is increasing among the children of immigrants. Other nationalities with a low share of university graduates across the three generations include the two selected African countries and Finnish men.

The share of women from East Asia and from Southeast Asia with university education is higher than that of men across the three generations considered. This is also the case among South Asians plus people from Thailand who migrated at an earlier age or were born in Sweden but not among those who moved to Sweden after the age of 13.

### *Employment Rates*

The three panels in Fig. 12.4 depict the incidence of employment across generations. It is interesting to observe that the employment rates of the foreign-born who migrated after the age of 13 show almost completely opposite patterns to that of education. That is, East Asians, who have the highest share of university graduates, are now among those with the lowest employment rates; whereas Southeast Asians, who have a low share of university graduates, plus the Bangladeshi, have the highest employment rates.

The low employment rates among Asian groups with a high share of university graduates could be explained by the potentially higher occupational aspirations among this group. The higher entry barriers to professional occupations, where the level of regulation is higher, often require access to local networks. Existing studies conducted in Sweden show that, for certain immigrant groups, secondary education is as important—if not more—for finding employment as tertiary education (Dahlstedt &

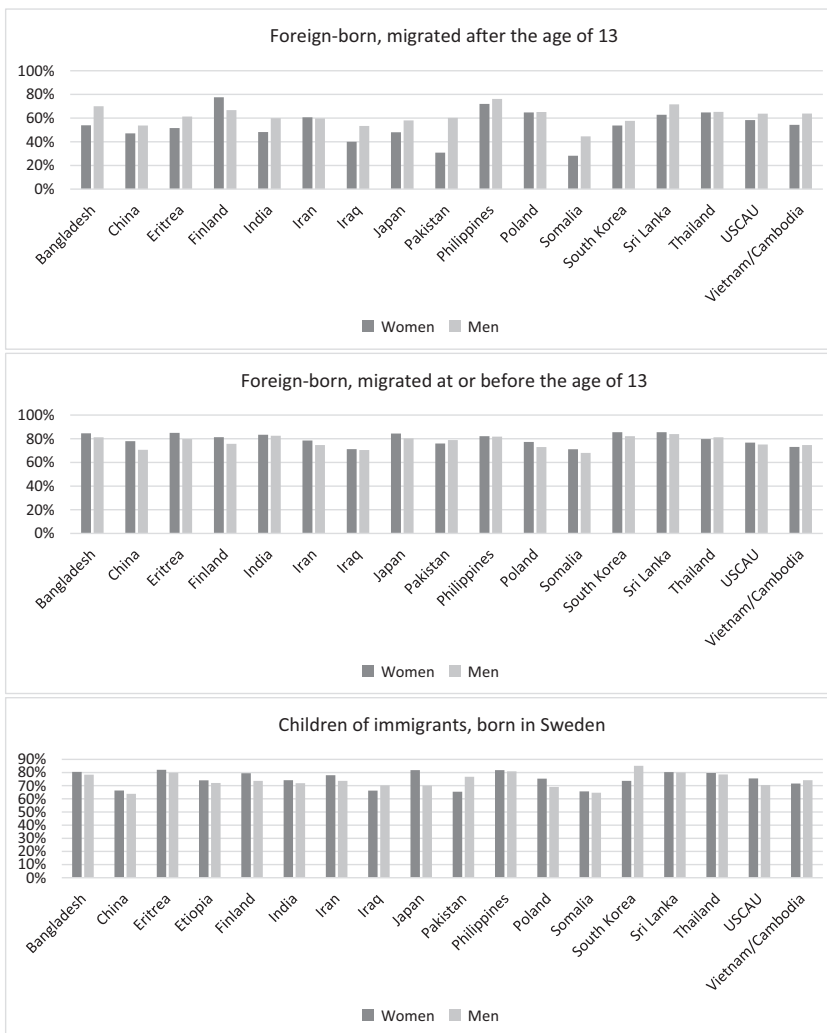


Fig. 12.4 Employment rates of people aged 25–60 in Sweden by major nationalities, 2012

Bevelander, 2010). Highly educated refugees have occupational aspirations and often decide to invest in further education before entering the labor market (van Heelsum, 2017; Bygnes, 2021; Mozetič, 2021). There might be discrimination at play that our descriptive analysis of register data could not capture (cf. Ahmed et al., 2023, this volume).

While the share of people with tertiary education among different nationalities was similar across the three generations analyzed, it is interesting to see that the employment situation differs across the generations. In contrast to those who migrate after the age of 13, among the countries of origins that we compare, we observe higher employment rates across all foreign-born Asians who moved to Sweden early in life, together with those who came before the age of 13 with origins in Finland and Eritrea. Chinese, Pakistanis, and Vietnamese/Cambodians are among those who show lower employment rates together with Iraqis and Somalians. However, we should note that the differences in the proportions between the groups are very small when it comes to this group compared to Asians migrating after the age of 13.

Among the children of immigrants, we see patterns that are somehow similar to those who migrated after the age of 13. Chinese and Japanese are among those with the lowest employment rates, whereas South Korean men have the highest employment. Non-Asian groups with high employment rates are, once again, Eritreans. Like in the case of foreign-born people who moved to Sweden after the age of 13, other groups with low employment rates are Somalians and Iraqis.

Pakistani and Bangladeshi have the largest gender gap in employment, favoring men, among Asians who migrated after 13, together with people from Afghanistan and Somalia. Among foreign-born who moved to Sweden after turning 13, the differences are almost evened out and, for most groups, women have marginally higher employment rates. This is also the case for the children of immigrants, with the exception of South Koreans, Afghanis, and Pakistanis, among whom slightly more men than women are employed.

### *Employment in High-Skilled Occupation*

While the employment rates of Asians do not resemble their level of education, the share of them working in highly skilled occupation does. This is especially true for East Asian nationalities (Japan, South Korea, and China) across the generations analyzed. Moreover, foreign-born South

Asians, like India and Pakistan, also show the highest share of people working in managerial and other highly skilled positions among the countries we compare. Men from USCAU and women from USCAU, Finland, Poland, and Iran also have a high representation of people working in these occupations.

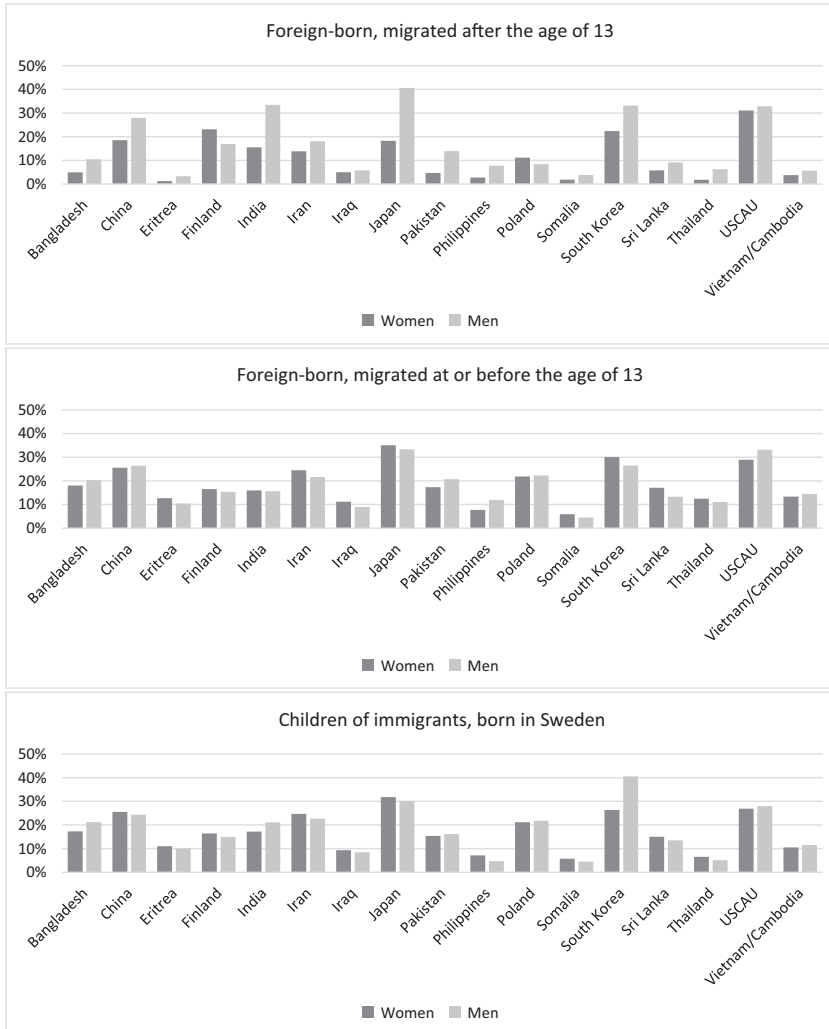
People from Southeast Asian countries like Vietnam, Thailand, and the Philippines, as well as South Asian countries like Pakistan and Sri Lanka, or with ancestors from these countries, on the other hand, are among those with the lowest share of people employed in highly skilled jobs. Other groups on this side of the spectrum include Eritrea, Somalia, and Iraq.

The gender gap is quite significant among the foreign-born who migrated after turning 13. Among Asians, the share of men working in highly skilled positions is considerably higher than the share of women among the Japanese, Indian, Chinese, South Koreans, Pakistani, or Bangladeshi. This pattern is not in line with the numbers presented for university education in Fig. 12.3, which shows a higher representation of women for most of these nationalities. However, like in the case of employment rates, the gap becomes marginal for those who migrated before the age of 13 and those who are children of immigrants, among which, in many cases, women are in a better position than men (Fig. 12.5).

### *Overqualification*

We complete the analysis of the socioeconomic position of Asians in Sweden by showing some figures on their education to job mismatch and, more specifically, on overqualification. Only men from Pakistan and Bangladesh figure among the foreign-born nationalities with high overqualification rates, for those who migrated to Sweden after the age of 13. Three East Asian countries (Japan, China, South Korea) and India are the four nationalities with lower rates among the same group of foreign-born men.

While the incidence of overqualification is higher among people who migrated before the age of 13, Asian men are doing even better among this group in comparison to those who migrated after the age of 13 and children of immigrants: there are no Asian nationalities among the top 10 countries with the highest overqualification while four countries (Japan, Thailand, the Philippines, and South Korea) are represented among the least overqualified. Among Asian women, however, the situation is not so



**Fig. 12.5** Share of employed people working in highly skilled occupations aged 25–60 in Sweden by major nationalities, 2012

favorable: for the foreign-born who migrated to Sweden after the age of 13, South Korea, China, and Japan also show higher rates. For those who migrated before that age, women from Vietnam/Cambodia, the

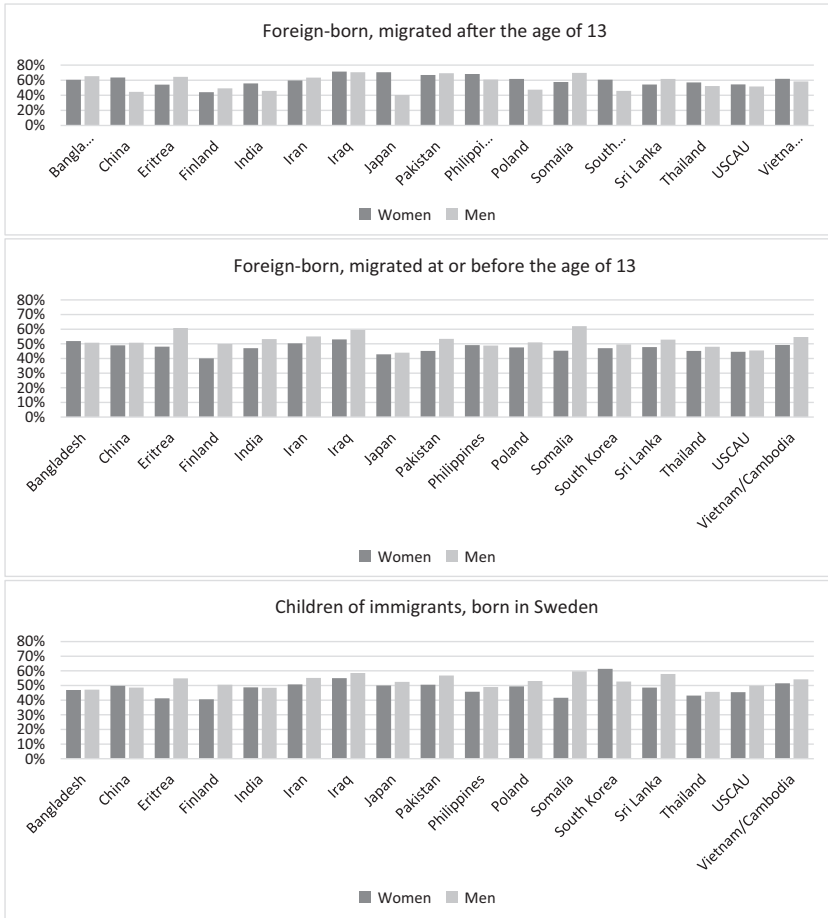
Philippines, and China are among the major 10 nationalities with the highest incidence of overqualification, whereas Japan and Thailand figure among those with the lowest incidence.

As for the children of immigrants, men from Sri Lanka and Pakistan compared to those from Thailand, Bangladesh, India, China, and the Philippines figure among the nationalities with the highest and lowest incidence of overqualification, respectively, among the nationalities compared in this chapter. Among the Swedish-born children of immigrant women, those with parents from South Korea, Vietnam/Cambodia, Pakistan, Japan, and China are among the most overqualified, whereas Thailand figures among those with the lowest incidence of overqualification (Fig. 12.6).

## CONCLUSION

Although perhaps temporarily, the Covid-19 pandemic brought the discussion of anti-Asian racism to the Swedish public. Public discussions and academic work on migration and integration in Sweden have so far paid little attention to the Asian population, despite its steady growth. Our ambition with this chapter was to tackle the narrative scarcity (Lee & Ramakrishnan, 2021) of Asians in Sweden. This chapter is one of the first contributions from Sweden to systematically identify the socioeconomic experiences of the heterogeneous Asian population in Sweden in comparison to other immigrant groups. The analysis and results we present should be seen as a first step in mapping out and understanding the ethnic and racial positions of Asians in Sweden, an attempt to shine a spotlight on the otherwise invisible Asians in Sweden. We attempt to unpack the myth of the model minority and empirically address the position of Asians in Sweden, in terms of racial triangulation to dominant native-born Swedes and other minority groups such as Middle Eastern or Afro-Swedes.

The statistical analysis of register data shows some similarities among East and South Asian compared to Southeast Asian nationalities in education and occupational level: the former has a higher share of highly educated people and of people employed in highly skilled occupations, whereas Southeast Asians are underrepresented among the highly skilled. The picture of employment is more mixed, but a reverse pattern can be seen in the data: South Asian nationalities are still overrepresented among the groups with the highest employment rates whereas East Asians have, in general, a relatively low incidence of employment. The incidence of



**Fig. 12.6** Share of employed overqualified people aged 25–60 in Sweden by major nationalities, 2012

overqualification is relatively low for Asian men but relatively high for women. In general, women are better educated than men but have slightly worse employment outcomes.

In sum, our analysis shows that, as in the case of the United States, there is great variation of socioeconomic outcomes of Asians in Sweden and, therefore, it is not possible to generalize their experiences. There



seems to be, however, some internal differences based on the regions of origin: East Asian groups are highly educated but have lower employment rates. Once employed, they work in highly skilled occupations. Southeast Asians have lower education and, therefore, are underrepresented in highly skilled jobs but have high employment rates. South Asians stand between these two groups. These patterns within the Asian groups are strikingly similar to the situation in the United States (e.g., Chin, 2020; Lee & Ramakrishnan, 2021).

Furthermore, there are also differences within each region and across generations. For example, the children of Korean immigrants have the highest employment rates among all groups analyzed in this chapter, whereas the children of Chinese immigrants have the lowest. Differences between the groups that we observe may depend on several intersecting factors. More research analyzing potential reasons behind these patterns, such as reasons for migration, average time of residency in Sweden, migration history of each nationality, or racism and discrimination toward Asians in the labor market and society, in general, is needed to understand where Asians stand in Swedish society today. Some Asian groups may experience proximity to the majority society through their socioeconomic status, however, this does not shield them from racism and discrimination. Research from the United States shows that Asian Americans face significant racism and discrimination in the labor market (Chin, 2020).

What do all these results say about the model minority myth and Asians' racial position in Swedish society in relation to other minority groups? As stated earlier, Asian experiences are diverse, some leaning more towards the predominantly refugee-oriented immigrant groups (Iraq, Iran, Eritrea, and Somalia) while other groups show higher educational levels than those of European and North American origins. More specifically, the results indicate that East Asians exhibit certain merit-based power with their higher educational levels and occupational matches. However, this only supports the myth of the model minority as the employment outcomes themselves not as equally as promising even for East Asians. In fact, Asians across generations in general, especially Southeast Asians, show similar paths as the other non-European groups that we examined with respect to employment, education, and overqualification. In the cross-sectional analysis there was no indication that Asians are a model minority group, succeeding and excelling in

employment and education, especially when we look at the children of immigrants.

Through the analysis of the 2012 register data, we provide a snapshot of the diversity of Asians in Sweden before the Covid-19 pandemic. The mobility of persons of Asian origins in Sweden was indeed heavily influenced by the pandemic because of the temporary closure of the Swedish and EU borders. It was not only the EU borders but also their home countries' border controls and quarantine measurements that affected and continue to affect the mobility of many Asians. The various long-term consequences of Covid-19 on Asians—or any other populations with foreign background—in Sweden are unknown. Furthermore, beyond the effects of the pandemic on Asians in Sweden, quantitative and qualitative research addressing the social, economic and political positions of Asians in Sweden is needed to understand the migration and integration trajectories of Asians in relation to other minority groups in Sweden.

In order to understand the mechanism of racial triangulation, it is especially important to highlight the individual experiences and narratives together with the systematic analysis of Asians with different ethnic, migration and socioeconomic backgrounds. This is especially important in the post-Covid era, where mobility was disrupted, and racially targeted hate was experienced. As the population of Asians is growing through both new births and new migrants, it is crucial to understand how Asians and other immigrant groups are perceived in the Swedish society in order to understand the idea of nativity-based power (Tawa et al., 2013), as well as whether racial and ethnic minorities are perceived as Swedish and as part of Swedish society. One study indicates that it is only those who are racially categorized as White who are perceived as Swedish (Osanami Törngren & Nyström, 2022). Analyzing Asian experiences is integral in unpacking the layers of privileges and disadvantages that different racial and ethnic minority and majority groups possess, as well as to understand inclusion and exclusion from Swedish society.

Our hope is that this chapter not only raises awareness about the population that is otherwise overlooked in research concerning migration and integration but also questions fundamental assumptions regarding experiences of Asians versus those of other immigrant groups in Sweden. Heterogeneous experiences in socioeconomic status alongside the social images and treatment of Asians may form or divide the experiences and identity of Asians in the future. Whether the Covid-19 pandemic brought together heterogeneous Asians—and, more generally, other migrants across countries with

diverse socioeconomic status and nationalities, is a relevant question to pose (Lerpold et al., 2023, this volume) also in relation to the ideas of racial triangulation. Persons of Asian origins, especially East Asians, had an increased risk of facing racially charged, pandemic related hate, something that Afro-Swedes and Swedes with Middle Eastern background may otherwise face daily. Whether the globally spread anti-Asian rhetoric generated and legitimized through the pandemic will continue, and how differentiated yet common experiences of discrimination and exclusion across racial groups will be framed and understood by the public and individuals in society may determine not only the course of formation of Asian experiences and identity but also the answer to the question whether migrants across countries will be brought together in the post-Covid Sweden.

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# Loyalty and Integration Among Young Adults with Minority Backgrounds in Norway

*Jon Rogstad* 

## INTRODUCTION

Norway is often referred to as a high-trust society, showing not just a high level of institutional trust but also small differences between people and groups (Wollebæk et al., 2012). This has resulted in equity as a core value and a phenomenon constituting a significant part of the so-called Norwegian or Nordic model (Kautto, 2010; Rothstein & Uslaner, 2005).

However, the Covid-19 pandemic—particularly the way Norwegian society handled the challenges associated with the pandemic—similarly to what Valdez (2023, this volume) found in Sweden, revealed significant differences between majority and the minority groups (Elgersma et al., 2021). Most of these differences are not visible on a daily basis, such as the proportion of those who were vaccinated for protection against Covid-19

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and differences related to serious illness and death as a result of a Covid-19 infection.

In this chapter, I am partly concerned with the reasons for these differences, as well as the notion that the differences serve as a prism to discuss the different types of integration in the multicultural Norway of 2022. The analyses are based on secondary quantitative data as well as qualitative interviews with young adults with an immigrant background living in Norway. In particular, I choose to emphasise similarities and differences between immigrants with long and short residences. More specifically, attention is focused on immigrants with a Pakistani background—a group that started to immigrate to Norway in the late 1960s—in contrast to immigrants originating from Poland. To a large extent, the latter group arrived in Norway following the 2004 EU enlargement.

In Norway, integration is largely understood in terms of participation in education or the labour market. Although participation implies all societal arenas, the economic sphere is regarded as crucial in terms of education and working life. However, inspired by Marshall (1950), social scientists claim that there is more to citizenship than participation. According to Marshall, citizenship has both a social and a legal dimension. The latter deals with objective matters, such as holding a passport and being a member of a nation. In contrast, the social dimension implies affiliation and a sense of belonging to a society (Brubaker, 1989; Joppke, 2007; Crul & Schneider, 2010; Brochmann & Midtbøen, 2021).

One explanation as to why there are differences between the majority and minority populations with regard to support for the authorities' vaccination ambitions is a lack of information and differences in knowledge about the value of vaccines (Christensen & Lægereid, 2020). Another explanation is the high level of institutional trust in Scandinavia (Rothstein & Stolle, 2008), with the majority population appearing to be more loyal than minority groups. Minorities are often portrayed as being more loyal to others within their minority group (see also Putnam's 2000 distinction between bonding versus bridging social capital, and the Scandinavian type of "institutional social capital", which refers to institutional trust; Kumlin & Rothstein, 2005).

A theoretical framework revealing different forms of attachment by loyalty seems relevant to the subject of this chapter. Arvidson and Axelsson (2021, p. 41) suggest that loyalty can be understood as "a bond to something specific". Moreover, loyalty is about affiliation over time. Trust, on the other hand, whether generalised or institutional, imply some kind of

reliance. According to the Oxford English Dictionary, trust is “confidence in or reliance on some quality or attribute of a person or thing, or the truth of a statement.”

Inspired by Arvidson and Axelsson (2021), I distinguish between vertical loyalty, often associated with institutional trust, and horizontal loyalty, which is based on links between individuals within a particular group. This distinction highlights integration in terms of different bases of belonging. Furthermore, focusing on belonging, such as subjectively perceived links, entails a criticism of the politicised understanding of integration as a concept that solely captures participation.

The chapter is organised as follows: first, an overview of the theoretical framework that forms the basis for the analysis is given. Then the data and methods are presented before I enter the empirical and central discoveries. At the end of the chapter, the findings are discussed in light of an overall framework of how experiences from the pandemic can be used as a prism to understand more of the important conditions for integration, in general, and, more specifically, how integration is linked to economic and cultural participation.

### ANALYTICAL FRAMEWORK

Integration and loyalty constitute the central analytical concepts of this chapter. Regarding *integration*, as discussed in the volume of which this chapter is part, one cannot refer to a specific theory (Lerpold et al., 2023). Instead, the term is to be understood as part of a broader theme. There are, however, some key characteristics in the debate on integration and how it is utilised in the coming analysis that are central to point out. First, integration is a term that denotes both a process and a goal. A society characterised by integration, as opposed to assimilation, constitutes citizens holding equal opportunities, without being identical. Consequently, there is a desire to preserve diversity (such as freedom of religion) but at the same time to uphold certain common rules (such as respect for individual rights). Others argue in favour of a policy that entails major changes in which individuals are increasingly mainstreamed. The line of assimilation receives much criticism for being too paternalistic and for not recognising the culture and fundamental human rights of minority groups (Alba & Nee, 1997). Segmented assimilation theory is arguably in an intermediate position, with a particular focus on the children of immigrants along

with their upward or downward mobilisation within different segments of society (Zhou, 1997).

The latter is relevant for understanding how individuals and groups adapt to inclusionary and exclusionary practices in different institutions. Consequently, the central questions within integration policy are the conditions for different citizens to be (in terms of participation), and feel as (a sense of belonging), a part of larger spheres in society. The system of education and the labour market are not random institutions. In Norway, as already mentioned, integration is often understood in terms of having a job or attending school. Consequently, the authorities are concerned that all individuals obtain the required skills so that they are in a position where they can get ordinary jobs in the labour market. Having a job, according to the authorities, is crucial to the individual's self-realisation and economic independence; at the same time, it is also crucial that the welfare state is a collective goal (Dølvik et al., 2015). Consequently, we rely on a large proportion of the adult population to contribute through taxes instead of being an economic burden on society.

The second term that is central to subsequent analyses is *loyalty*. Arvidson and Axelsson (2021) discuss the term in its own right and the significance of social dimensions to loyalty. In this chapter, loyalty is relevant because it highlights how different forms of attachment provide different conditions for action—including getting vaccinated or not. By introducing a distinction between voluntary and involuntary loyalty, Arvidson and Axelsson offer a concept that captures how citizens can act based on different types of considerations, both related to the authorities and to their own group. Moreover, loyalty can have a form of internalised values, but it can also be an outcome of external pressures. In this way, loyalty differs from trust, which can also be aimed at both groups and institutions, but which is primarily either high or low. Regarding loyalty and the distinction between institutions and groups, Arvidson and Axelsson introduce a division between vertical and horizontal loyalty. While the former is aimed at institutions upwards in the system, horizontal loyalty is aimed at other individuals or groups at the same level.

The two dimensions, voluntary vs involuntary and vertical vs horizontal, can be assembled, collectively making a four-field table. Table 13.1 presents such a four-field table with various descriptions—close to ideal types—that may constitute theoretical abstracts of how different combinations may affect the propensity to be vaccinated against Covid-19.

**Table 13.1** Four-field table: dimensions of loyalty

	<i>Vertical loyalty</i>	<i>Horizontal loyalty</i>
Voluntary	1. Social engagement. High level of institutional trust	2. Sense of belonging High level of generalised trust
Involuntary	3. Rules of conduct Mandatory demands Economic sanctions Use of force	4. Negative social control Social sanctions

*Source:* Adapted from Arvidson and Axelsson (2021)

Field 1—the left upper quadrant—comprises a combination of loyalty that is both voluntary and vertical. These will typically be people who are characterised by a high degree of institutional trust. Furthermore, it is appropriate to include people with a particularly large social commitment to a specific issue, such as public health. In Field 2—the right upper quadrant—loyalty is voluntary and horizontal. This may be relevant in a situation in which there are close ties between members of a group that are at the same level in terms of power and where they are in the chain of governance. Field 3—left lower quadrant—is a combination where loyalty is vertical, for instance, with links to those in power and involuntarily. This is a situation with strong authority, where governance is done through mandatory decisions and where there are clear sanctions aimed at those who do not follow the instructions. The last combination, Field 4—right lower quadrant—consists of a combination in which loyalty is involuntary and horizontal. This situation is typically characterised by strong social control, either negative or positive. The key aspect is that the control is assigned to a group that the individual is a part of, which means that the options are reduced.

Obviously, loyalty and trust are two concepts with several similarities. First, trust is also a relationship that can be vertical, to institutions, and horizontal, when there are individuals in-between (Kumlin & Rothstein, 2005). However, it is more difficult to understand involuntary trust. A basic principle of trust is that the concept is positive, in accordance with loyalty. The difference is that you can follow an instruction loyally, even if you do not believe or put trust in the basis for the decision. Currently, we can distinguish between voluntary loyalty, pointing to an internalised form of either institutional or generalised trust. Involuntary loyalty is not about

trust but will be perceived as external pressure, which in extreme circumstances can appear as undesirable coercion.

## DATA AND METHODS

This chapter is based on publicly available statistics on employment and the proportion of people vaccinated in different groups. The statistics are published by Folkhelseinstituttet, the Norwegian Institute of Public Health. The purpose was not to carry out an in-depth statistical analysis. Rather, the aim is to reveal key differences and similarities that call for explanations. Employment is used as an indicator of economic integration. In the political debate about the situation of the immigrant population, economic integration is often understood as a suitable proxy for integration in other spheres as well. The present analysis challenges this perception.

Statistics show that Covid-19 vaccination rates differ a lot between different immigrant groups (Nilsen et al., 2021). Unfortunately, we do not know why these differences occur, but research reveals that length of residence, education and social contact with the majority population fail to provide sufficient explanations. Nevertheless, as we shall see, the proportion of immigrants who are vaccinated seems to be related to institutional and social trust. Based on this understanding, I suggest interpreting the vaccination rate as a proxy of cultural integration. The vaccination rate is a valid indicator, as it correlates with the prevailing ideology given by the medical authorities and politicians in Norway. By compiling figures for employment and the proportion of those who have been vaccinated among the majority and different minority groups, we gain insight into how the two conditions may correlate.

In addition to statistical data, I also use qualitative material consisting of interviews with 14 people of Pakistani and Polish backgrounds. I conducted interviews with these informants for another project on inclusion in working life, but I had the opportunity to contact them again when researching this chapter. The two groups are interesting as they arrived mainly as labour immigrants, with the difference that the Pakistani group was dominant in the first phase of modern immigration, from the late 1960s, while Polish immigrants have dominated labour immigration in Norway since the 2004 EU enlargement. The informants have in common that they are young adults, aged 25–35 years. Consequently, migrants from both groups have essentially the same common reasons for moving to Norway. However, there are also clearly significant differences: while

the informants from the Pakistani group are mainly second-generation immigrants, the informants from the Polish group were born in Poland. Regardless, this difference does not necessarily represent a decisive criticism given that the analyses from Nilsen et al. (2021) are correct. They show that length of residence has no impact on vaccination propensity, rather there are other factors, which is what is examined in this chapter. Nevertheless, it was a crucial criterion for selecting informants that they had good knowledge of Norwegian society, had a full-time job for at least five years, as well as that they spoke and wrote Norwegian. Therefore, I only include informants who have in common that they have resided in Norway for at least five years, which is the minimum number of years required to apply for citizenship in Norway.

### COVID-19 AND IMMIGRANTS IN NORWAY

Covid-19 triggered major debates about causes, politics, and, specifically, why the pandemic seems to have affected different groups differently. An independent Covid-19 commission was established to conduct a comprehensive review and assessment of the management of the pandemic by the Norwegian authorities. The Commission examined all relevant aspects of the pandemic management. In a white paper published in early spring 2022 (NOU, 2022), current research and experiences were summarised. A major question was related to why immigrants were apparently harder hit than the rest of the population. The commission pointed out that the immigrant population was overrepresented among the infected and seriously ill, while they were underrepresented among those vaccinated. Furthermore, they show that it took a long time for authorities to implement measures specifically aimed at this part of the population (NOU, 2022, p. 12).

The report was based on assessments of national and international research and also addressed whether genetic factors can explain why immigrants were hit harder by the pandemic. Currently, this question cannot be fully answered, as there is not sufficient data. Nevertheless, we know that immigrants were much more affected by Covid-19 and that there were differences between the majority and the minority populations (Diaz et al., 2021). The infection rate was particularly high in households with a background from Iraq, Pakistan, Syria and Turkey, as well as when controlling for age, number of household members and geography (NOU, 2022, p. 395).

In addition to the possible significance of genetic differences, other factors are highlighted. As already mentioned, immigrants' exposure is linked to a great extent by living in larger households. Further, these are groups that often have jobs that cannot be performed from home, including, among others, public communication, grocery stores and health care, all of which require employees to be physically at the workplace. No matter which explanation is correct, it is interesting to note that although Pakistanis had higher infection rates than native Norwegians, their vaccination rates were comparable. Obviously, one explanation is that it took longer for the vaccination rate among Pakistanis to take off. Another explanation concerns communication challenges, including the fact that it took a long time for important information to be translated and reach all sectors of the population (Brekke, 2021). At the same time, it is clear that while translation is necessary, it is not sufficient to ensure change. An important element is that all parts of the population have confidence in what the authorities are telling them. A lack of trust is highlighted as an explanation in several contexts, particularly whether this could be a reason why infection-tracking teams did not receive many close contacts from immigrant populations.

Overall, we see that the differences are explained by structural factors, differences in language and knowledge, as well as cultural inequality, perhaps also of segregation as in Valdez's study of Somalis in Sweden (2023, this volume). These are all aspects of integration. Consequently, the difference between the majority and the minority can be interpreted as an expression of a lack of integration, which motivates the questions asked in this chapter.

## ECONOMIC AND CULTURAL INTEGRATION

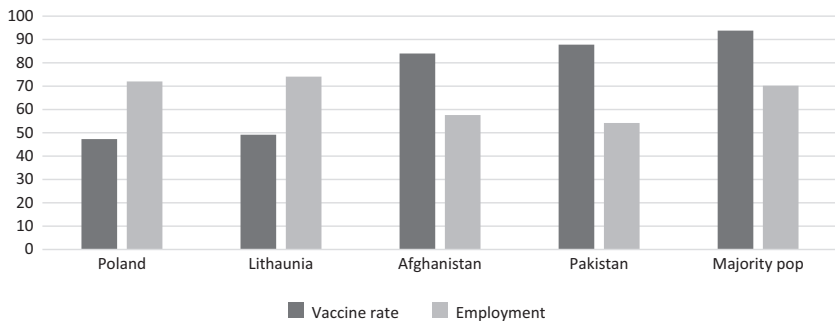
The political debate on integration often concentrates on participation in education and work. For this reason, discrimination represents a significant obstacle to achieving integration. Field experiments conducted in Norway show that the discrimination rate in terms of lower call-back rates for job applications with Pakistani names is approximately 25 per cent (Midtbøen, 2014; Birkelund et al., 2020). Obviously, discrimination is negative for individuals. In addition, systematic discrimination is negative on a societal level as it increases demographic and taxation challenges in the welfare state, specifically regarding how many working people are



needed (dependency ratio) to support people out of the work force (e.g. children and pensioners).

There are several reasons why participation in education and working life is held up as important. First, work ensures economic independence for the individual. Second, it is crucial that people contribute to the common good by paying taxes. Third, working life is an arena that produces integration and creates trust (Rogstad & Reegård, 2018). At the workplace, you meet other people, learn the Norwegian culture and, consequently, become part of the working life that affects identity on the individual level. On a political level, work is often presented as a means to fulfil a dream—constituting the meaning of life. The so-called work-line is decisive and expressed in several ways, especially through Norwegian gender equality policies and efforts to develop a strong welfare state, both of which have a strong focus on women's opportunities to have paid work by removing barriers and by building up welfare and care arrangements.

Consequently, a fundamental assumption is that economic and cultural integration is interrelated: if a person becomes economically integrated, he or she will eventually be culturally integrated as well. However, the question is whether this is indeed the case. Some answers are presented in Fig. 13.1, which shows the employed rates and the share who were vaccinated against Covid-19. Therefore, the premise of the comparison is that the Covid-19 vaccine is a valid indicator of cultural integration; we will return to this, suggesting that the action can be interpreted as an



**Fig. 13.1** Covid-vaccinated (one dose) on 15 November 2021 and employed in 2021 in different groups based on country of origin (in % of the full population of each group and those aged 16–66, respectively). *Sources:* FHI (2021), SSB (2022)

expression of whether one is loyal to the Norwegian authorities' strong call for everyone to be vaccinated.

Figure 13.1 highlights an interesting pattern when assembling the two objectives of cultural and economic integration based on average figures for the entire population. Among the majority population, about 70.2 per cent were employed in November 2021. One main reason for the high level is that a large proportion of women are also employed. Figure 13.1 also shows that the proportion who were vaccinated in the autumn of 2021 was high among the majority population (93.8 per cent). The last 6.2 per cent are a mixture of people who, for various reasons, cannot or will not be vaccinated.

What is the situation for minority groups? According to the information presented in Fig. 13.1, there are large differences between the groups. Furthermore, there is a distinction between established labour immigrants (with a long migrant history) and new labour immigrants (with a shorter migrant history). The former group includes people with backgrounds in Pakistan and Afghanistan, while Lithuania and Poland are key countries of migrant workers since 2000. Furthermore, employment among the oldest labour immigrant groups is slightly more than 50 per cent compared to 75 per cent among labour immigrants from Lithuania and Poland. Consequently, the latter groups are employed at a level approximately in line with the majority population. If the level of employment is accepted as a valid indicator of both economic and cultural integration, it is reasonable to assume that the distribution of employment would correspond to the differences in the level of the proportion of those who have been vaccinated.

Figure 13.1 shows that there are significant differences between the groups, but the pattern is not what we expected. Surprisingly, a lower proportion of new migrant workers are vaccinated than among the group who came first. The differences are marked: while more than 80 per cent of the groups from Pakistan and Afghanistan were vaccinated before 15 November 2021, less than 50 per cent of labour immigrants from Lithuania and Poland were. Consequently, we can establish that the trends for employment and vaccination point in different directions when comparing different groups of labour immigrants.

Thus, the next question is how the links between cultural and economic integration should be understood. Subsequently, I will use different forms of loyalty, as stated in Table 13.1. Empirically, this part is based on

qualitative interviews with young adults with Pakistani and Polish backgrounds.

### VOLUNTARY VERTICAL LOYALTY

Field 1 combines willingness and vertical loyalty. This is a form of social engagement that entails institutional trust. Regarding questions about differences in who has been vaccinated, it is reasonable to assume that variations in institutional trust are decisive. First, and foremost, it affects who endorses or, more specifically, puts trust in the information provided by public authorities. The fact that loyalty is voluntary implies that the trust has been internalised, which distinguishes it from what we can refer to as external loyalty, where one acts according to the wishes of the authorities, but only out of external coercion or to avoid negative sanctions (this form constitutes Field 3 in Table 13.1).

In the qualitative interviews, it emerges that this type of loyalty is widespread, especially among the group of Pakistani immigrants who had been in Norway for a long time. Some illustrative quotes are as follows:

For me, it's like we are obliged to take the vaccine. Of course, it's not something I want, but who wants a syringe in my arm. (Pakistani man, 28)

We all have to contribute. (Pakistani woman, 23)

What do I know about medicine? Try to keep up, but it's not that easy. Difficult information. (Pakistani man, 29)

Among the interviews with the Polish group, it was not difficult to find quotes expressing scepticism about the authorities. Scepticism, however, was also present and expressed by the informants with Pakistani backgrounds, just as some from the majority population. Admittedly, these are marginal groups, but they exist and they have come to terms with public discourse. For instance, there were a number of public demonstrations and, in social media, a great many opponents to the public agenda. In different ways, they argue that one should not blindly listen to the authorities, just like anti-vaccinators in many other West European countries.

In order to identify differences in the data, it is relevant to point out non-findings: among Polish migrant workers, no one advocated following the advice of the Norwegian authorities. During the interviews, a number

of different people and institutions were mentioned and referred to, but it was striking that Norwegian political authorities and health leaders did not appear to be relevant. On the other hand, values within the Polish community were referred to as significant. Consequently, a form of horizontal loyalty seems to dominate over vertical loyalty. One possible explanation is that many of the Poles in Norway have family in their home country, including primary families. Typical examples of the latter are male craftsmen who work in Norway while they have a wife and children in Poland. Thus, the male Poles fit into a category within transnational studies, where they physically find themselves in one country, but are mentally in a second country. This is relevant in this context, because vaccination rates in Poland have been low throughout the pandemic.

It is relevant to point out that the vaccination rates in Pakistan is low. Consequently, the difference seems to be that the Pakistani group is more integrated in Norway. Based on the data I have available, I cannot determine if the difference is to be understood as an outcome of the length of residence; typically, members of the Pakistani group in Norway have large households and, thereby, a wider affiliation. Nevertheless, an important conclusion is that cultural and economic integration do not always follow the same pattern and it is not necessarily that one follows the other. This conclusion contrasts with the authorities' unilateral focus on the fact that work leads to integration in a broad sense. In other words, voluntary vertical trust is differently distributed within labour migrant groups.

### VOLUNTARY HORIZONTAL TRUST

The second route combines voluntary and horizontal trust. According to the literature on transnational ties (Vertovec, 2009), there are often important bonds within ethnic groups living in different countries. These bonds are vital not just as a source for identity formation but also for understanding praxis and integration in a new country. Migrants and people living in exile tend to use their country of origin as a main reference for a long period. An important question, which we do not know the answer to, is for how long. The perspective is also relevant regarding generalised trust, which links people within the same group.

The interviews with Polish labour migrants reveal that many of them see Norway as a place where they have worked for a period of time, while Poland is the place they live and where they envision having a family and getting old.

I'm going to be working here for a while. It's nice, but I go home most of the holidays. My wife and first daughter live in Poland. I don't think there's much for them here. (Polish man, 27).

Nor was it just about having a family. One of the informants, a 25-year-old man, told me that he did not know much about the future, but that he was far from sure it would be in Norway.

I don't know how long I'm going to stay in Norway. Don't get me wrong, I'm fine. And I don't have to think about anyone, but myself. In a few years, it might be different, I hope to be married and have children. If so, I don't know if I want to live in Norway. I don't know. (Polish man, 25)

It was also advocated that in Poland, one is more concerned with family than with the authorities:

[t]o put it simply, we don't rely so much on the authorities. If you know what I mean. Why would we do that? I don't think so many people do. The history of Poland tells us that we should not. (Polish woman, 27)

These quotes are largely consistent with research on why immigrants seem to be particularly vulnerable.

Indseth et al. (2021) present several factors that are relevant in this context. In particular, the importance of travelling is pointed out, which is important for many migrant workers, who often have families in other countries. Regarding migrant workers from Pakistani and Polish backgrounds, it is probably the case that Poles travel to their home country more often than the Pakistani group. Several explanations to this fact can be given: Poland is geographically closer to Norway than Pakistan, both countries are part of the Schengen area, more people have primary families (spouses and children) in the country of origin among the Polish group. Thus, it is likely that Poles are more exposed in the form of physical travel.

Another explanation is related to communication. Migrant workers are not entitled to language training in Norway, and, thus, it is reasonable to assume that there will be systematic differences between Pakistani and Polish migrant workers with regards to how good their Norwegian is. Among other things, Brekke (2021) point out that communication during the Covid-19 pandemic, in the sense of having a message that reaches out to everyone and is understood among different citizens, was challenging.

## INVOLUNTARY VERTICAL LOYALTY

With the third field in Table 13.1, attention is placed on vertical loyalty that is involuntary. For example, if you follow the advice of the authorities because you feel pressured through sanctions or coercion.

In Norway, although vaccination was not compulsory, many individuals experienced and observed that there were some strong normative sanctions targeting groups that did not want, or were not able, to be vaccinated. The immigrant population also received negative coverage when it emerged that there was, on average, lower vaccine coverage among persons with an immigrant background. The authorities actively worked to ensure that the message that Covid-19 vaccines were free was disseminated in several languages. Furthermore, quick tests were available for free.

However, despite emphasising that vaccination in Norway is voluntary, it may be questioned whether it is perceived as voluntary at all. There is at least some doubt that the health authorities had a double message. Thus, the vaccine was presented as voluntary; all groups were highly encouraged to be vaccinated—for your own security and to help others by not putting them at risk. In Norway, where the population endorses the authorities, there was considerable support and confidence directed towards the authorities' regulations. Some of the restrictions met resistance, such as the ban on people visiting their own cabins during Easter in 2021. Nevertheless, the vast majority followed the authorities' regulations.

In some cases, more pressure was placed on the population than was conveyed through government announcements, such as the freedom of movement within areas in Norway and visiting countries with a high infection rate. Even more invasive were the closure of schools and the fact that workplaces were required to facilitate working from home, where possible. Furthermore, the use of face masks was mandatory when in a store or travelling on public transport. In this way, society appeared to be highly regulated during the pandemic. At the same time, Norway differed from many other countries in that there was no distinction in access to events for people with or without proof of vaccination, recovery or testing. Therefore, Norwegian measures seemed legitimate and conspicuously collective. The crucial thing was where you lived because individuals had to follow both national and local measures.

The situation for migrant workers is also important and illustrative. When there were strong regulations related to travel between countries, labour immigrants were severely affected. If they stayed in Norway, they

could not receive family visits and, if they went home, it was difficult to return. In this way, the pandemic began to highlight the role of immigrant labour in the Norwegian economy.

I don't know what to do. If I want to stay here, I have to take a vaccine, like all Norwegians. (Polish man, 26)

Many were unsure about giving up their contacts. I mean, I've taken a vaccine, but I don't know about the people I've been with. (Pakistani man, 32)

In the interviews, it was stated that many were uncertain about what the right thing to do was. In the quotes above, we can also sense some ambivalence that many expressed. This means that they faced pressure to take a vaccine if they were to function in Norway, while several expressed trust in what the authorities would use the information for. It seems that external loyalty was imposed on them. Consequently, the fact that they had agreed to be vaccinated was not necessarily something they did because they relied on information from the Norwegian authorities, but because they accepted that adhering to the authorities was a key premise for staying in Norway. However, this should be of particular importance among the Poles as they travel more to visit Poland than the migrants within the Pakistani group visit Pakistan.

### INVOLUNTARY HORIZONTAL LOYALTY

The last field, Field 4 in Table 13.1 points out that loyalty to one's own group does not have to be perceived as voluntary. This may occur if a person who wants to get vaccinated but does not do so because key players in their own group discourage them. In debates about immigrant communities, this is a situation that is typically associated with negative social control. In many contexts, this is used to understand child rearing in some minority families and how they may conflict with majority values (Friberg and Sterri, 2021).

The question was whether a similar type of regulatory mechanism could be found that may explain the differences in vaccination rates. The interviews indicate examples that can be interpreted within such an understanding, but the findings are far from unambiguous. Among other things, a Polish woman explained her decision as follows:

I think most people in Poland don't take a vaccine. You know, no one in Poland does. At least almost ... I really could not tell anyone home if I had taken the vaccine. To be honest, I think my father would go crazy. (Polish woman, 29)

This informant expresses pressure coming from different directions. If she decides to be vaccinated, she might suffer from negative sanctions from her family, but she is not certain. In some countries, however, vaccines and the use of face masks have become political debates and hotbeds. It is conceivable that the informants also saw it in this way, but it is not certain. More certain is that this category did not capture the message many of the informants expressed.

## DISCUSSION

The empirical data provide examples of how young labour migrants have different kind of loyalties. Some take the authorities' calls into account, others do not: while several endorse the message they received, others were sceptical and, perhaps more importantly, they perceive that people from their country of origin have a different opinion than the majority population and the Norwegian authorities. The relationship between practice and various loyalties reveals that transnational ties are a defining condition affecting the processes of integration. Transnational ties imply that that minorities at the same time have different frames of reference, which comprise ties to groups in different countries (see also Bilgili et al., 2023, this volume).

This insight has important theoretical implications, which I address in this last section. First, it is relevant to review some central points. A starting point relates to integration and whether it is correct, as is often assumed, that economic integration leads to social and cultural integration. The simple answer is that we do not find such a connection. On the contrary, while the Pakistani group's vaccination rate is roughly on par with the majority population, the proportion is lower among labour migrants of Polish origin. This difference is the opposite in terms of economic integration, where the proportion of people in work is close to the same as the majority population among the Polish group, while it is significantly lower among those of Pakistani origin.

Among the Polish informants, economic integration, in terms of working, seems to be a faster process than cultural integration. Consequently,



the findings in this chapter are an argument for distinguishing between economic and cultural integration. Another implication, then, is that time should be included as a variable in the understanding of the bumpy road towards integration. As I initially note, integration is understood as participation, primarily in working life and education. Thus, the term is not confined to the economic sphere, but it is a premise that belonging and, thereby, cultural integration result from economic integration. The analyses here shows that if one uses the vaccination rate as a proxy of cultural integration and compares it with economic participation, then the logic does not completely follow. Consequently, the premise that economic and cultural integration follows each other is flawed, it is neither causal nor correlated. Rather, there is a need for an elaborated theoretical understanding of the relationship between participation and the sense of belonging. Vertical and horizontal loyalty provides a basis for understanding different types of practices.

One question is the validity when using the vaccination rate as a proxy of cultural integration. It can be argued that the vaccination rate is a valid indicator of cultural integration, as it touches on institutional trust and what one would like to refer to as linking social capital (Woolcock, 1998). In Norway, which is a society characterised by a high level of institutional trust, support for the authority's unambiguous approach can be interpreted as a type of acceptance of current norms and values. Consequently, trust in, and support for, the government's approach is not perfect, but still a relevant measure of integration and support for key cultural values in society.

At the same time, limited data form the basis of the analyses in this chapter. A question is whether it makes sense to compare employees from Pakistan and Poland. Both groups are dominated by, and originally came as, labour immigrants. At the same time, there is no doubt that they differ significantly. The vast majority of the Polish group arrived in Norway since 2004, comprising immigrants who themselves have migrated to Norway. In contrast, members of the Pakistani group have lived in Norway for many years, with complex motivations for migrating and for staying. A large proportion of the Pakistani group is probably better recognised as second generation who are born and educated in Norway, than as labour migrants. This may weaken the comparison somewhat, but at the same time this development can also be seen as steps towards general integration.

That said, all informants can speak Norwegian, they have lived in Norway for at least five years, are employed and, not least, studies show that the length of residence cannot explain differences in the propensity to be vaccinated (Nilsen et al., 2021). For this reason, there is reason to ask if there is anything else that can explain the differences that we can observe empirically. Vertical versus horizontal loyalty is a possible explanation, which is interesting as it offers a possible explanation of why some groups are vaccinated in lower proportions than others but also as a way to better understand the processes of integration in society.

Another topic of theoretical interest concerns the unit in the process of integration. In the introduction to this chapter, I refer to the authorities who claim that integration equals participation in education and working life. In other words, integration is understood in terms of an action by the single individual in relation to educational and economic institutions. The informants of Pakistani origin consistently have several family members in Norway. Moreover, they underline the significance of belonging to a family. Their subjective understanding of integration is related to their sense of belonging in Norway, which by definition includes more people than just themselves. Among them, many had spouses and parents in Norway. Among Polish labour migrants, the situations appear to be different. Some have spouses in Poland and most have parents in Poland. They also have a clear understanding that, one day, they will move back to Poland. Thus, their frame of reference is largely the situation in Poland, while their understanding of the situation in Norway was more external, something they had to adapt to if they were to stay there.

In other words, family was important to all the labour migrants, but for the migrants of Pakistani origin, important family members live in Norway. In contrast, the collective identity among migrants from Poland is mainly in Poland. The relevance is considerable in this context, not least because the Norwegian authorities not only highlight participation when analysing integration but they also see participation as a matter for the individual person. This chapter shows that belonging is crucial: it is important whether an individual sees themselves as belong to the Norwegian community or whether they belong to other communities, where there are different norms and perceptions about, for example, vaccinations. This study indicates that labour market participation does little to change this perception. Rather, the connection seems to be the opposite in that social and cultural affiliation is more important than whether someone is employed or not.

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# Immigrant Integration and Vaccine Hesitancy Among Somali Immigrants in Stockholm

*Sarah Valdez*

## INTRODUCTION

The sociocultural aspects of integration are an important, but sometimes overlooked, component of immigrant success in their new homeland. Interacting with ethnic majority members can provide important sources of social and cultural capital to newcomers, which may help them learn local customs and language, as well as successfully navigate unfamiliar institutions. Furthermore, these social interactions can facilitate feelings of acceptance and belonging for the newcomer.

On the other hand, if immigrants are isolated from ethnic majority group members, their integration can be stunted. Without acquaintances who can help them figure out their new environment, they may struggle to succeed in local labor, education, and housing markets, especially if these markets function very differently from those in their country of origin. Further, a lack of social interaction with natives may make immigrants

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feel as if they do not belong in their new homeland, thereby reducing feelings of social cohesion, trust, and national identification.

For these reasons, the communities that immigrants live in can have important consequences for their integration. Some neighborhoods, by demographic composition or urban design, encourage inter-ethnic interaction, while others inhibit it. Research suggests that developing tolerance requires both the presence of diverse groups in neighborhoods and an urban layout that facilitates interactions; otherwise, tolerance may be hindered (Wessel, 2009). In neighborhoods composed of diverse ethnic or socioeconomic groups, residents are more likely to encounter others who are different from themselves. They may engage in types of meaningful intergroup contact that helps individuals overcome their negative attitudes toward outgroups (Allport, 1954), thereby increasing feelings of tolerance and acceptance of diversity on all sides. These effects are multiplied if neighborhoods contain social infrastructure, such as parks or libraries, that encourage social mixing. However, when neighborhoods contain few members of the ethnic majority group, the segregation of immigrants results, cutting them off from valuable sources of hegemonic cultural capital and diverse sets of social capital that can aid integration.

A plethora of research shows the many negative effects of segregation, but the Covid-19 pandemic reveals one potential outcome that is largely overlooked in the social sciences, namely, vaccine hesitancy. Marginalized groups, including immigrants, are more likely to oppose vaccination (Crawshaw et al., 2021; Rogstad, 2023, this volume), which is attributed to (1) a lack information about the safety or efficacy of vaccines; (2) a lack of access to medical systems that provide vaccines; or (3) a lack of trust in governmental or medical institutions. Since segregated immigrant communities do not receive the information flowing through ethnic majority social networks and may feel distinct or unwelcome in their new homeland, it is easy to see why their members may lack the trust necessary to vaccinate at rates similar to the ethnic majority group.

In this chapter, I examine two neighborhoods known to house a group identified as vaccine hesitant, Somali immigrants, in two adjacent areas of northern Stockholm. Thus, insights are gained into the compositional and built environment factors that may lead to this group to deviate from the norm, thereby signaling low levels of integration. I show that the group is quite residentially segregated, but also argue that the community may be undergoing a transition into a ghetto, which could slow future integration. Understanding those neighborhood characteristics that help or

hinder integration is especially important as new waves of immigrants arrive in Europe and as current second-generation immigrants come of age in these communities during the pandemic and beyond.

## NEIGHBORHOODS AND INTEGRATION

Residential segregation perpetuates inequality because geographic isolation leads to social isolation (Wilson, 1987), and when one group is socially isolated from another, access to social and cultural capital is restricted. Thus, segregation has important consequences for a group's success upon arrival in a new country. For both native-born and immigrant residents, segregation patterns determine the quality of a group's access to jobs, schools, and cultural capital necessary to successfully navigate bureaucracies, educational systems, and labor markets. Issues of access are particularly important for newly arrived residents because they must learn to utilize a new set of institutions, often with limited language skills. Many barriers are eased for the second generation, but their outcomes are still dependent on the social networks within which they are embedded, as demonstrated in case studies on second-generation groups in the United States (Portes & Zhou, 1993). To the degree that their social networks isolate them from access to types of cultural capital that aids in successfully navigating new institutions, assimilation should be more difficult for immigrants.

Segregation can be thought of as groups being separated from each other, both in terms of where they live and where they conduct the daily routines of their social life. Because neighborhoods structure human interactions, they have important implications for the ways in which immigrants are either integrated or marginalized. Low levels of segregation are, in general, best for immigrant integration when measured in terms of quantifiable outcomes such as income, employment, and education. High levels of segregation into ghettos have the opposite effect, tending to lead to poorer outcomes for the segregated minority group (see also, Ahmed et al., 2023, this volume). However, moderate levels of segregation can lead to the development of vibrant ethnic enclaves that facilitate integration. In this chapter, I consider two factors that affect segregation levels—the ethnic composition of a neighborhood and the built environment of a neighborhood. The former determines the probability of encountering diverse others if interactions are randomly determined, while the latter structures patterns of interactions.



### *Ethnic Composition*

The demographic composition of an area has important consequences for intergroup contact because it determines, *ceteris paribus*, the probability that one encounters a member of an outgroup. Integration is eased when segregation is low because when immigrants are exposed to the majority population, they are also exposed to valuable forms of cultural capital. Majority group members can help newcomers figure out how to navigate institutions in their new homeland. For example, they can help them figure out how to find an apartment, dress for a job interview, book a medical appointment, or choose a school for their children. Since cultural capital flows through network ties, the level held by an individual is determined by the level held by persons in his network. In diverse neighborhoods, where both ethnic majority and minority members live, there is greater possibility for immigrants to be exposed to majority group members who hold the deepest knowledge of hegemonic forms of cultural capital needed to aid success.

Ghettos, on the other hand, are neighborhoods whose residents are highly segregated from the rest of the population, thus hindering integration. These areas are described in the literature as areas where marginalized groups are concentrated, living involuntarily either because they have been forced by the state, in the case of apartheid and other forced segregation policies, or because residents are trapped in cycles of poverty that limit mobility (Philpott, 1978; Varady, 2005). The conditions that create ghettos lead to high concentrations of minority groups in these areas, thus ensuring that it is difficult for residents to escape. African American neighborhoods in the United States are examples of modern ghettos because they were created through racial separation policies (Massey & Denton, 1993) and persist as racially isolated areas that have concentrations of blacks as high as 90% (Peach, 2009). Ghettos often reflect or perpetuate social hierarchies, hence limiting the ability of residents to achieve parity with dominant groups. They may be marked by inferior housing, poverty, and low-quality schools or other amenities. In the case of immigrants, living in disadvantaged areas separate from the ethnic majority group impedes their ability to fully integrate into the host society.

In terms of segregation levels, ethnic enclaves fall somewhere between integrated neighborhoods and ghettos. These areas are marked by a concentration of an ethnic minority group, but are dually dilute, meaning that the ethnic minority does not comprise a majority in the neighborhood,

nor does a majority of the group live in such a neighborhood (Peach, 2009). They are communities where people live voluntarily, and they offer social and economic benefits to residents. Newly arrived immigrants settling in these neighborhoods can tap into the social networks of co-ethnics who preceded them, figured out the local cultural landscape, and can now help them integrate through a process of segmented assimilation whereby assimilation into the local co-ethnic community facilitates assimilation into the broader society (Portes & Zhou, 1993). For example, established migrants can help new arrivals find employment in co-ethnic businesses, or explain how the educational, medical, and housing markets differ from that of their shared country of origin. In this sense, they serve as sort of “translators” of cultural capital.

Ethnic enclaves are seen as vibrant, ethnic communities from the outside; so, unlike ghettos, they attract members of the ethnic majority group. These areas may, for example, have a relatively large share of majority group residents but also serve as destination neighborhoods. Their unique offerings, such as specialty ethnic shops and restaurants, musical performances, and cultural festivals, attract non-residents, who then spend time in the area, thereby facilitating interactions between minority and majority group members. Examples of these types of neighborhoods include Chinatown in New York City and Little Havana in Miami. Residents of these areas do not suffer the poor social and reputational costs of minorities living in ghettos. And they are generally not stuck in these areas due to a level of poverty or set of policies that limit their residential mobility.

These three types of neighborhoods are based on the ethnic composition of residents: integrated areas, highly segregated ghettos, and moderately segregated ethnic enclaves (Poulsen et al., 2001; Johnston et al., 2002). The categories are listed in Table 14.1, with host communities being those where the ethnic majority group is the majority in the neighborhood and minority enclaves being those where the ethnic majority are a minority.

Minority enclaves can be further divided into four types, each with an increasing level of minority isolation. Residents of pluralist enclaves (called *associated assimilation-pluralism enclaves* by Poulsen et al., 2001) are the least isolated from other groups while residents of polarized enclaves and ghettos are the most isolated. This implies that residents of polarized enclaves and ghettos are least likely to encounter outgroup members in the neighborhood, most notably ethnic majority group members.

**Table 14.1** Types of neighborhoods, according to demographic composition

	<i>Ethnic majority</i>	<i>Ethnic minorities</i>
<i>Host Community</i>	<i>Must be a majority</i>	<i>Must be a minority</i>
isolated	>80%	<20%
non-isolated	<80%	>20% and ≤50%
<i>Minority Enclave</i>	<i>Must be a minority</i>	<i>Must be a combined majority</i>
pluralist	≥30%	one group ≥20%
mixed-minority	<30%	70%–100%
polarized	<30%	70%–100% with one group ≥60%
ghetto	<30%	70%–100% with one group ≥60% (and ≥30% of that group's total city population live in such areas)

*Source:* neighborhood typologies derived from Poulsen et al. (2001)

### ***Built Environment***

The built environment also has important consequences for intergroup contact because it serves to either enhance or impede social interactions between groups. Social infrastructure, including community centers and sports fields, encourage interactions between individuals, especially among diverse sets of people who may otherwise not meet, which makes them sites that Pettigrew (1998) finds should increase tolerance through social contact (Wessel, 2009). These places, which are described as “spaces that facilitate social connection” (Latham & Layton, 2019, p. 9) can help overcome obstacles caused by social problems like poverty and discrimination because they generate social ties within the neighborhood, thereby increasing levels of social capital and increasing feelings of belonging within the community (Klinenberg, 2018). This ability of social infrastructure to increase social capital and counter the tendency toward homophily in social networks is beneficial to integration because it increases the likelihood that members of the ethnic majority and minority groups will interact, even in segregated neighborhoods where the chance of an encounter would be much lower in the absence of such amenities.

Furthermore, locations and neighborhood boundaries can have an impact. Even if a neighborhood is segregated and inhabited primarily by immigrants, if it is centrally located and the neighborhood boundaries are porous (for example, it is not set apart by a freeway, river, or railroad

tracks), non-residents will likely pass through with some regularity. They may work in the neighborhood or visit local restaurants and bars. This is particularly the case for ethnic enclaves, whose specialty restaurants, shops, and celebrations attract visitors, so the neighborhood becomes a destination rather than a place to avoid.

Unfortunately, however, many of the immigrant-dense neighborhoods in European cities are located in unattractive suburbs, such as the *banlieues* of Paris, the council housing estates of London, and *Miljonprogrammet* (the Million Program) projects of Stockholm; the latter discussed in this chapter. These types of neighborhoods serve to exacerbate residential segregation because they discourage social mixing. They are located far from city centers and are often quite isolated with distinct rather than porous boundaries, meaning that non-residents are unlikely to pass through during the course of ordinary daily life. These factors, combined with their generally unappealing architecture and often undeserved reputations as dangerous areas, mean that ethnic majority group members rarely choose to spend free time there. Hence, patterns of residential segregation are mirrored in social interactions and these neighborhoods serve to keep immigrants in the area isolated.

### SOMALI NEIGHBORHOODS IN STOCKHOLM

Most Somali immigrants arriving in Sweden have done so since 2006. Fleeing Somalia's ongoing civil war, refugees seek asylum in Sweden because of its generous migration regime. Using data covering 1990 through 2017 from Statistiska centralbyrån (SCB—Statistics Sweden), I describe the residential patterns of Somali immigrants in Stockholm and show that they are a highly segregated group living in areas that may be undergoing ghettoization. The data contain information on country of birth, which I use here to proxy ethnicity, as there is no other measure of ethnic identity available in Swedish register data.<sup>1</sup>

At the beginning of the period under study, in 1990, there were 481 Somalis and their children living in Stockholm. By 2017, this number had increased to 13,076. Over this period, members of this group settled primarily in two neighborhoods located in northern Stockholm, Rinkeby and

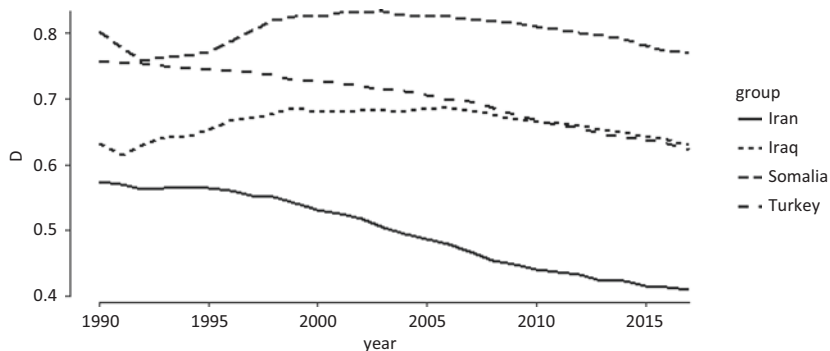
<sup>1</sup>This distinguishes it from the United States, for example, where the census includes self-reported race/ethnicity.

Tensta. Local reputations suggest these are the most disadvantaged, immigrant-dense areas in the city. In 2017, only 3.6% and 8.5% of the populations of Rinkeby and Tensta, respectively, were ethnic Swedes. This low proportion of ethnic majority residents, combined with the fact that no one minority group comprises at least 60% of the neighborhoods' populations, qualifies these as mixed minority enclaves (Poulsen et al., 2001).

Though the numbers of immigrants from Somalia increased by several magnitudes over this time period, one thing that remained constant were their neighborhoods of choice. Rinkeby and Tensta were always the areas with the highest number of Somali immigrants. Just over 100 Somali immigrants lived in Rinkeby and Tensta (41 and 63, respectively) in 1990. Though those numbers are small, they represent 21.6% of the Somalis living in Stockholm that year—more than any other neighborhood. This was still true at the end of the period under study, though the numbers had grown. In 2017, there were 5453 Somali immigrants and their children living in the two neighborhoods, comprising 41.7% of all Somali immigrants in Stockholm.

Based on these trends, these neighborhoods could be moving closer to becoming a Somali ghetto. They satisfy one of the two criteria of the typology applied above. Namely, more than 30% of the Somali population of Stockholm live in one of these neighborhoods. However, the second criterion is not met because neither neighborhood is composed of at least 60% Somali residents. In 2017, 18% of Rinkeby and 27% of Tensta were migrants of Somali descent. The criteria that 30% of the group's population live in an area that is highly segregated is an important factor above and beyond the 60% threshold at the neighborhood level because it indicates that the group faces systemic disadvantage. It indicates a limited choice of neighborhoods due to factors such as discrimination, poverty, or segregation-inducing policies.

Furthermore, Somali immigrants in these neighborhoods are highly segregated from the majority Swedish population. The dissimilarity index (D) of Somali immigrants and their children in Rinkeby and Tensta hovered around 0.8 throughout the period under study (Fig. 14.1). This means that roughly 80% of Somali immigrants would need to change neighborhoods in order to achieve an equal distribution in the city. The dissimilarity index ranges from 0 to 1, and 0.8 is exceptionally high—on par with hyper-segregated black communities in the United States. As a point of comparison, Fig. 14.1 also contains the dissimilarity index of the next two largest migrant groups in Rinkeby and Tensta (Iraqis and Turks).



**Fig. 14.1** Segregation index (D) of most populous groups in Rinkeby and Tensta. *Source:* compiled by author using register data from Statistics Sweden-)

It also includes immigrants from Iran, who were identified in previous work as a monoethnic group in Stockholm segregated at levels falling between those of US Hispanics and African Americans (Musterd, 2005). Immigrants from Somalia have been more segregated than any of these groups since at least 1990, when the data starts.

As mentioned above, one indication that the neighborhoods may be a ghetto is due to the voluntary (or not) nature of immigrants settling there. I stated that Rinkeby and Tensta were the neighborhoods of choice for immigrants from Somalia, but I use that term loosely. Though there are no official state policies that place them in these areas, immigrants likely live there due to severely constrained options. Rental housing in Stockholm is often rent-regulated and administered through a queueing system. Newly arrived immigrants who sign up are placed at the bottom of the queue; as of 2021, the wait time is between seven and eleven years in the whole Stockholm area, according to Bostadsförmedlingen i Stockholm (the Stockholm Housing Agency; Bostadsförmedlingen, 2021), which manages the queue. As Rinkeby and Tensta are considered undesirable by ethnic Swedes, the wait times are shorter, which is why so many immigrants and so few Swedes reside there. Both neighborhoods were built as part of the Million Program, an ambitious housing project devised by Socialdemokraterna (S—Social Democrats) to alleviate housing shortages caused by post-war urbanization. The government built more than one million new housing units (for a population of around 7.5–8 million) during the 1960s and 1970s based on the latest design principles. Those

design principles, however, did not appeal widely and are now considered unattractive concrete blocks. So, while immigrants are not placed in the neighborhoods by official state policies, they may have no other practical choice because of the municipal housing policy.

In addition to their lack of aesthetic appeal, the locations of Rinkeby and Tensta are undesirable. They lie in the northern suburbs of Stockholm and, as part of the Million Program, they were constructed as self-contained communities for rural residents moving to the city for blue-collar employment during the post-war boom. They contain shopping centers, schools, and social service offices, and were even designed so that roughly half of the residents in the area could be employed inside the neighborhood, giving little reason for residents to leave the area daily and mix with residents of other areas. Furthermore, there is a lack of social infrastructure encouraging interaction within these areas. Using OpenStreetMaps data to measure amenities like libraries, community centers, sports fields, and cafes in Stockholm, I find that Rinkeby and Tensta are outliers, lacking this kind of social infrastructure. The city-wide average is 22.7 amenities per neighborhood: Rinkeby has 17 and Tensta only eight—both more than two standard deviations below the average.

These neighborhoods are surrounded by ring roads, separated from other neighborhoods by freeways and wooded areas. Hence, they do not have porous boundaries that encourage passing through. However, it should be noted that the exception to this lack of porousness lies between Rinkeby and Tensta themselves. Though they are two neighborhoods administratively speaking, it may make sense to consider them one community. They are adjacent neighborhoods connected by footpaths passing through manicured green areas. Residential units in each neighborhood are approximately 75 meters (246 feet) apart at their closest point and about double that at their furthest adjacent point. Thus, it is reasonable to assume that people move fluidly between the two and that there are likely cross-cutting social ties that bind the two areas together.

The Swedish national police consider Tensta/Rinkeby one neighborhood and classify it as the most extreme type of vulnerable area (*särskilt utsatt område*) in the country. “Vulnerable area” (*utsatt område*) is a categorization by police that indicates an area is “characterized by a low socioeconomic status and where the criminals impact the local community” (Polisen, 2021). For instance, due to social unrest and vandalism in Rinkeby/Tensta, the only remaining bank and social welfare office have moved out of the area, along with several other commercial enterprises,

such as mobile phone provider Tele2 (Sanandaji, 2020, p. 236). The designation as an extremely vulnerable area, the most severe classification available, indicates that there are parallel social structures operating and that the police consider it difficult or impossible to enforce laws in this neighborhood.

When taken together, it seems likely that Rinkeby/Tensta might be considered a ghetto or perhaps moving in that direction. Although there is no one ethnic minority group that forms a majority in the neighborhood, Somalis are a plurality because no other ethnic group has as large a number of residents there. Very few ethnic Swedes live in the area, likely because they consider it an undesirable location. Furthermore, it is an area marked by blight and disadvantage, thus making it difficult for newcomers to thrive and become integrated into the broader society. Consequently, this will make it difficult for them to acquire the resources necessary to move out of the area—reinforcing the neighborhood as a place one is forced to live, rather than chooses.

### SOMALI IMMIGRANTS AND VACCINATION

Somalis in Stockholm are an interesting group to study when considering immigrant integration in a post-Covid-19 world because they have been identified by Folkhälsomyndigheten (Fohm—Swedish Public Health Agency) as vaccine hesitant. There is only one other community in Sweden that is also classified as hesitant: an anthroposophic group<sup>2</sup> living in the town of Järna near Stockholm with low levels of childhood vaccination against measles, mumps, and rubella (MMR). However, the Somali community living in the neighborhoods of Rinkeby and Tensta is the only immigrant group documented as having low vaccination rates and exhibiting hesitancy. While the Swedish average MMR vaccination rate for two year olds in 2012 was 97.2% in the general population, among Somali immigrants in Rinkeby and Tensta it was nearly 30 percentage points lower (Fohm, 2015).

Vaccination rates are an important proxy for integration because they signal an acceptance of local norms and institutional trust (Rogstad, 2023, this volume). Vaccinations have long been the backbone of global health initiatives, and we know that it can be difficult to reach and vaccinate

<sup>2</sup> Anthroposophy is a spiritual movement that embraces holistic medicine. It is perhaps best known for being started by Rudolf Steiner, the founder of Waldorf education.



isolated or poverty-stricken communities. The Covid-19 pandemic revealed that marginalized groups living in wealthy, developed countries can also be hard to reach. For example, several minority groups, such as blacks in the United States, Palestinians in Israel, and Māori in New Zealand are less likely to be vaccinated against Covid-19 than majority populations in the same country. Likewise, ethnic-minority immigrants in high-income countries also have lower vaccination rates (Crawshaw et al., 2021).

Vaccine hesitancy, defined as “the reluctance or refusal to vaccinate despite the availability of vaccines” (MacDonald, 2015, p. 4163) is generally attributed to three factors. First, individuals are less likely to vaccinate due to a lack of institutional trust (Rogstad, 2023). They may not, for example, trust the medical establishment due to past mistreatment, as is the case with blacks and the Tuskegee experiments in the United States. Likewise, they may not trust the government or other social institutions more broadly. There appears to be institutional mistrust in Rinkeby/Tensta, as evidenced by vandalism of banks and commercial chain stores, as already noted. Further, residents’ unwillingness to cooperate with police investigations signals mistrust of law enforcement. Additionally, related directly to vaccines, Somali mothers in the area report facing discrimination at local medical centers. They say that nurses have preconceived notions about Somali’s attitudes toward vaccination and resent them without giving them a chance to explain their beliefs (Jama et al., 2019).

A second reason for vaccine hesitancy among marginalized groups in wealthy countries is a lack of access to medical care. While this should not be an issue in Sweden, due to universal healthcare provision, there are still barriers for some groups. For example, some Somali mothers in the survey mentioned above decided to receive care at health centers outside their neighborhood due to perceived discrimination by nurses in health centers in Rinkeby and Tensta. This increases the time and expense associated with accessing routine medical care, which could be onerous to socially disadvantaged groups. Additionally, some migrants are discouraged by the online booking system for medical appointments. In Sweden, it requires using a smartphone app linked to one’s bank account and personal identification number, which verifies one’s identity on a website containing personal medical information, including test results and appointment times. However, using such an app, which requires the cross-linking of multiple pieces of personal information, may be uncomfortable to individuals from countries with less stable or trustworthy government and banking systems. In a United Nations report on the vulnerability of minorities in the

Nordic region during the pandemic, the operations manager of a Somali cultural group said, “Instead of using bankID [the smartphone app], maybe you should create a line where all can book vaccinations, or even be on site to answer questions that people have” (FN, 2021). So, while they are provided free medical care, some immigrants may find the process of accessing it to be inconvenient or invasive.

The third reason for vaccine hesitancy is a lack of information, which seems applicable to Somali immigrants in Rinkeby and Tensta. One of the primary reasons given for MMR hesitancy is the fear that their children may stop speaking based on the false link between childhood vaccines and autism (Godoy-Ramirez et al., 2016). Because of low vaccination rates in the community, the Swedish public health agency has launched Somali-language vaccination campaigns, but much of the reason parents choose not to vaccinate is based on information they receive from other mothers in the community, not from official information campaigns (Jama et al., 2018). This further reinforces the importance of social contact in impacting behavior. More interaction with Swedes who have vaccinated children with no side effects may help reduce vaccine hesitancy more successfully than government-led information campaigns.

I posit that neighborhood composition and the built environment has helped to stunt integration among the Somali community in Stockholm and that vaccine hesitancy serves as an indicator of this. Vaccine hesitancy is also documented in Somali immigrant communities in Minnesota and Oslo, which suggests that it may be based on a belief brought from the country of origin that has not been challenged by updated information or customs in their new homeland. This may also explain why other prominent immigrant groups in the same neighborhoods, those from Iraq and Turkey, are not as vaccine hesitant. I could find no evidence of vaccine hesitancy among these groups in Sweden or elsewhere, which indicates it is unlikely that Iraqis and Turks arrive in Sweden with negative attitudes toward vaccination. Therefore, even if they live in areas that do not promote integration, their previously held beliefs on this issue are already in line with the general attitudes of the ethnic majority population in Sweden.

However, the vaccine hesitancy exhibited in Somali immigrant communities in various countries indicates that they likely arrive with this belief. That they retain these fears in Rinkeby and Tensta means that Somali immigrants are not enmeshed in social networks that promote trust in local institutions and spread accurate vaccine information. This is consistent with Rogstad’s (2023) findings that trust in public institutions

is an important factor in explaining vaccine rates among immigrants. Living in a highly segregated environment, where Somali immigrants have little routine exposure and interaction with ethnic Swedes, or even many other immigrant groups, means that they are less likely than residents of other neighborhoods to encounter information that challenges their beliefs about vaccinations.

## DISCUSSION

The high levels of segregation of the Somali group in Stockholm may be hindering their integration into broader society and this has had health effects beyond low levels of childhood vaccinations. The Somali community in Sweden and, in particular, Stockholm was hit hard by Covid-19, with excess death rates estimated at 220% (ECDC, 2021). Unfortunately, this is not only a sign of a lack of current integration but may also have negative consequences for integration after the pandemic because this group may feel they were neglected or stigmatized during a public health crisis when citizens relied on the government and fellow citizens to protect them. This experience could increase distrust in the healthcare system or other state institutions.

These high mortality rates are a sign of a lack of economic integration because they are partly due to low socioeconomic standing among the group. The increased transmission of Covid-19, alongside elevated mortality, is correlated with living in suburban areas like Rinkeby and Tensta as well as working in service professions. Public health authorities in Sweden describe the problem as, “poor living conditions make some populations more exposed to the virus, that is, more affected populations live in more densely populated areas and in smaller apartments, and they have no alternative but to use public transport. Their vulnerability is also enhanced by the fact that the same group of people are exposed to the virus at work; many of them are, for instance, taxi/bus drivers, cleaners, and care workers” (Bredström & Mulinari, 2022, p. 6). Many of these factors associated with Covid-19 transmission—overcrowding, smaller housing, and working in precarious service professions—are also signs of a lack of full economic assimilation.

However, integration is a two-way street. Full integration of an immigrant population not only requires that the immigrants achieve parity on socioeconomic measures but also that the majority population adapts to

and accepts the presence of immigrants and the diversity they bring. Unfortunately, it appears the Covid-19 pandemic may have driven a wedge between native Swedes and the immigrant Somali community. A study of public discourse on the pandemic in Sweden reveals that public figures deployed arguments that attributed high mortality rates to cultural differences between Swedes and immigrants. For instance, the leader of *Kristdemokraterna* (KD—Christian Democrats), Ebba Busch, wrote in a major daily newspaper that immigrant mortality was elevated because the Swedish strategy does not work for them. It was based on norms familiar to people born in Sweden, but unfamiliar to those living in the suburbs who come from “culturally remote societies” (Bredström & Mulinari, 2022, p. 8).

This “blame the victim” discourse, understandably, further distanced some immigrants. In the same study of public discourse, Somalis who were interviewed for a news report said Swedes blamed Somali’s illiteracy and cultural differences for their high infection rates. For instance, the high rates of Covid-19 transmission in Swedish elder care homes were attributed to immigrant care workers not understanding Swedish well enough to follow health guidelines. This discourse placed a double blame on immigrants. They were blamed not just for the deaths of Swedish elders in care homes due to “illiteracy” but also their own high rates of infection, which were partially due to the lack of privilege of working remotely from home.

## CONCLUSION

The Covid-19 pandemic may have set off a dynamic process between Swedes and Somali immigrant groups, whereby the lack of integration, reflected in low socioeconomic status, increased vulnerability to the virus. Subsequently, this vulnerability led to a discourse of blame that only served to further marginalizing immigrants. Not only did this likely reduce feelings of social cohesion and trust between ethnic Swedes and their Somalian counterparts it also reduced national identification among Somali migrants. This, coupled with segregated living conditions, makes it unlikely that these problems will be remedied quickly; however, as we move into a post-pandemic world, it is important to incorporate marginalized migrant groups along several dimensions.

But the opposite seems to be happening in the Rinkeby and Tensta Somali community, as the area seems to be moving closer to being categorized as a ghetto over time. Approximately 40% of all Somalis in Stockholm live in the area, which is one criterion for classification as a ghetto (Poulsen et al., 2001). They constitute a plurality in the area and their proportion has been increasing since 2010. If Somali immigrants become a majority, the neighborhood will meet the second criterion required for ghetto status. Concentrations of minority groups to the degree that their neighborhoods can be considered ghettos typically signal a lack of residential choice and mobility indicative of poverty traps. We would expect that if Rinkeby and Tensta become ghettos according to the criteria described, their residents will continue to be isolated and their integration into broader society further hindered.

Prime Minister Andersson stated that, “Segregation has been allowed to go so far that we have parallel societies in Sweden. We live in the same country but in completely different realities” (Reuters, 2022). Stopping the process of ghettoization will require changing not just the demographic composition of Rinkeby and Tensta but also its built environment. The Swedish government is trying to tackle the first issue by preventing concentrations of immigrants in certain areas by, for example, withdrawing social aid if they chose to live in an immigrant dense area rather than one assigned to them by the municipality. Greater levels of ethnic diversity combined with an urban space that invites more people to interact across ethnic lines will help newcomers integrate, especially if ethnic Swedes are willing to live in, or spend time in, the area. As Wessel (2009, p. 12) states, “Friendship feeds on extended and repetitive contact, which may grow from trivial contact, which in turn depends on enabling and constraining opportunities of the larger context.” Positive intergroup relations that may help Somali immigrants to trust Swedes, their institutions, and medical system depends on, at least partially, both physically co-locating Swedes and Somalis in geographic space as well as providing the social infrastructure that invites them to spend time interacting with each other, thereby exchanging valuable cultural capital.

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## Migration and Integration in a Post-Pandemic World

*Lin Lerpold* , *Örjan Sjöberg*  and *Karl Wennberg* 

### INTRODUCTION: BEYOND USING THE REAR-VIEW MIRROR AS A COMPASS

The Covid-19 pandemic, which started in 2020, left a stark mark on migration, irrespective of form, origin or destination. Lockdowns and quarantine rules, along with the subsequent disruptions to global supply chains and an economic slowdown have all played their part, as has insecurity in global modes of transportation as well as the natural reluctance to move about as the risk of being exposed to the virus mounted. Transnational movement and ways of living have also changed character, not least because labour migrants were cut off from their seasonal or long-term

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sources of income and those already abroad were at least partly cut off from their place of origin.

Yet, the pandemic appears to have had a mixed impact. The number of asylum seekers declined—at least temporarily—even though reasons for seeking protection are as evident now as in the pre-pandemic period. Indeed, the number of refugees and internally displaced people have not significantly changed. In Europe, Russia's invasion of Ukraine in 2022 added to an already very sizeable number of the internally displaced: within six months it resulted in an exodus of more than six million people to Europe and beyond. Many fled temporarily and subsequently returned home, many others remain displaced with unclear prospects for returning home (Mykhnenko et al., 2022; UNHCR, 2022). In parallel, other major streams of refugees (in the Middle East, Central and South America, South-East Asia) show few signs of abating.

The Covid-19 pandemic can be characterised as a critical event, one that's impacts are far from over, but also an event that may allow us to consider the migration and integration literature with the perspective afforded by Rushdie's (1992) 'broken mirror' metaphor. Though mostly over now, we have seen new waves of lockdowns in China and increasing incidents of new Omicron variants during the summer 2022; thus, the lasting impacts on migration and integration are not yet possible to isolate or fully know. This is compounded by the fact that, despite heroic efforts of demographers and relevant agencies, statistics on migration flows are anything but exhaustive, precise or up to date. Moreover, as the pandemic was playing out within a larger geo-political and macro-economic context, it is difficult to separate out the impacts of the pandemic from other processes and events taking place in parallel. Of special importance, for instance, the Russian invasion of Ukraine, its effect on food and energy security as well as inflation across a great many countries and the risks of stagflation in high-income economies might have a high impact on international migration and successful integration interacting with the parallel effects of the pandemic.

Of course, with no immediate end to the impacts of Covid-19 fully known it may be futile to ask what lies ahead. Can a return to the original status quo be expected and, if so, when? Or will we see a 'new normal' with modified patterns of behaviour, including different uses of all forms of social and physical mobility? Does this spell the end of physical mobility and, therefore, transnationalism as we have come to know it? What might replace it? Perhaps ever-increasing use of digital means of communication,

but less short-term physical mobility? Will return and onward migration change in magnitude or character? Could it be that we might see more displacement because of conflicts and climate change, but less of labour or opportunity migration, as Massey (2023, this volume) suggests? Or perhaps a shift in favour of more temporary labour migration under more restrictive programmes, as Gamlen (2020) suggested at the very beginning of the pandemic? Equally importantly, how will the status of migrants and their children themselves change? Xenophobia, racist everyday practices and other expressions of exclusion and discrimination increased alongside the spread of Covid-19, not to forget its political fallout in the form of strengthened nationalist extremism and growing anti-Asian sentiments. Or will there be a lasting impact of appreciating immigrants during the pandemic as “essential workers”? These are attitudes that may or may not wear off. It may also have an impact on diaspora relations and policies. What does this imply for origin and destination countries and processes of integration?

Given questions like these, it is useful to distinguish between trends that have been accelerated by, as opposed to originating in, the pandemic. As Singh (2022, p. 105) puts it, in many cases the “noxious seed of divisions has flourished in the case of COVID-19 [...] because it was planted in the fertile soil of exclusionary nationalism where us-them boundaries were already deeply furrowed”. Increasingly stringent restrictions on immigration and mounting difficulties just to apply for asylum on grounds of human rights violations are a case in point. If the conjectures of Gamlen (2020) are correct, the overall drop in migration that was expected following the initial impact of the pandemic (and which has since been confirmed, at least for major destinations among high-income countries, OECD, 2021) may also, in fact, be a continuation of, rather than a break with, the past. Similarly, although nationalism has been spurred on by recent events, it is but a continuation of prior trends (Mylonas & Tudor, 2021; Bieber, 2022). Finally, whether economic and social trends are correlated to the pandemic or caused by the pandemic itself should be carefully considered.

On the other hand, it would be more than of passing interest to see whether changes that have occurred since early 2020 will have any long-term impact, regardless of whether such changes are structural in nature or reflect adjustments in behaviour considering the experiences reaped during years of lockdown, reduced mobility and an increased sensitivity to the unpredictable qualities of life. For instance, observations to the effect that

protectionism, nationalism and discrimination may have increased in conjunction with the pandemic can neither be assumed to have been started by the pandemic, nor simply be extrapolated into the post-pandemic era. These come in different forms (Wang, 2021; Wang & Tao, 2021), some of which are distinctly tied to the different phases of the pandemic. For example, nation-state protectionism became ever more salient because of pandemic-related disruptions to global supply chains, leading to political priorities shifting from free trade towards national security concerns and domestic societal resilience. Thus, the European Union (EU) as well as the United States are rapidly branding specific sectors and technologies of ‘strategic importance’, shutting these off from foreign competition or competition from firms deemed to pose potential security risks (Wennberg & Sandström, 2022). It is still too early to tell to what extent such economic nationalism in high-technology sectors affects global migration patterns, but it could lead to high-skill workers being less mobile than before. The first half of 2022 saw an exodus of nearly all foreign workers (along with many native professionals and specialists) from Russia following its invasion of Ukraine and a rapid departure of expatriate workers from China following the repeated and strict lockdowns in Beijing and Shanghai. With respect to the large group of international university students, we are yet to see a return to pre-pandemic figures. This is a substantial source of both temporary and permanent migration with significant knowledge spillover and, therefore, a matter of concern in many countries. Sectors typically relying on foreign workers, like hospitality and agriculture, remain understaffed globally in 2022. However, with agriculture increasingly seen as a sector of national security concern, we are likely to see governmental efforts to increase labour supply—foreign and domestic—into the sector, as has already happened, if selectively, during the pandemic (Macklin, 2022). Post-pandemic working conditions and wages will no doubt affect migration, as will policies and implementation against modern slavery and human trafficking. These are important empirical questions for the near future.

Other pandemic-induced effects, including ‘vaccine nationalism’, clearly originated in the pandemic but were likely to spread across larger geographical space, often regionally. For instance, the EU centrally purchased and distributed Covid-19 vaccines to its member states according to population, while more than a dozen countries in the Global South banded together in partnership with the World Health Organization (WHO) in a long-term initiative to build vaccine and drug-making capacity. Meanwhile, the Gulf Cooperation Council countries came together to

support equitable access to vaccines. Although there were self-serving reasons for global coverage, many low-income countries had limited access and low coverage continued to fear vaccine hoarding by high-income countries. A pandemic, after all, cannot be combatted in one country alone and a lack of vaccines implied an increased number of cases and a prolonged presence, as “sustained transmission in low-access regions results in an increased potential for antigenic evolution, which might result in the emergence of novel variants that affect epidemiological characteristics globally” (Wagner et al., 2021, p. 1).

However, there may also be other, less clearly negative impacts from the pandemic of a more social nature. Perhaps transnationalism will take on a new meaning as digital technologies became more widely used to communicate, socialise and work in lieu of physical mobility. As Bilgili et al. (2023, this volume) argue, transnational relationships maintained through digital means were even more important for individual and collective resilience during the Covid-19 pandemic. Further, as many workers and employers were forced to adopt remote working or chose to become “digital nomads”, many families and parents became accustomed to and valued increased flexibility. Simultaneously, employers could enlarge their physical recruitment market beyond those in proximity. Many employers changed their policies to include distance work, while some nations are even considering remote working laws, like the ones proposed in Ireland and the Netherlands in 2022. How the development and acceleration of remote and hybrid working will affect migration and integration remains uncertain.

History and prior experiences are of critical importance here, not least because it helps mould our immediate reactions and forward-looking strategies alike. Yet the rear-view mirror, broken or not, has its limits as a compass to chart a course into the future. With only our repository of historically derived experiences, we find ourselves highly constrained in trying to work out an account of where we might be heading, be it in terms of the nature, extent or role of migration in a post-pandemic society. This is reflected in the contributions to this volume. These include the full range of verdicts, from those based on a deep understanding of the structural features of the demographic landscape that in the long run are likely to trump the effects of the pandemic to those that caution that it is premature to follow in the footsteps of early discussions as to where we might be headed. However, before commencing to draw out the conclusions of the collective effort that this volume on migration, integration and the pandemic represents, we must remind ourselves of the rationale for embarking on this project to start with.

## IMPACT OF THE PANDEMIC ON MIGRATION AND INTEGRATION

Sifting through the academic commentary that was generated during the first few months of the pandemic in early 2020, both the impacts of the pandemic and of the measures taken to prevent its effects from playing out were quick to make themselves felt. Although the actions failed to work, in many cases, as far as the spread of Covid-19 was concerned, an understanding of its short-term impact on migration and integration gradually crystallised. With respect to its health effects, it transpired that the aged, those in poor health and “members of underprivileged socio-economic groups [were] quite simply more at risk of not being able to stay out of the way” (Lerpold & Sjöberg, 2021, p. 352). As noted by Platt and Warwick (2020, p. 260), with “well-documented ethnic inequalities in health and in the labour market, we might expect unequal consequences of COVID-19 for ethnic minority groups” and much the same was often true for migrants (in addition to those listed in introductory chapter to this volume, Lerpold et al., 2023, also e.g. Hu, 2020; Kluge et al., 2020; Strang et al., 2020; Chetail, 2021; Bonizzoni & Dotsey, 2021; Hayward et al., 2021; Mukumbang, 2021). Indeed, it was suggested that weak “social support structures, bleak socio-economic prospects, unequal access to health care and social services, precarious housing conditions, tenuous living and working conditions, and higher risks of exploitation and abuse”, as Mukumbang et al. (2020, p. 3) report about South Africa, was made worse by the ‘lockdown containment measures’ that were quickly put in place.

As if this is not evidence enough, more systematic empirical surveys started to pour in, as detailed at some length in Lerpold et al. (2023). Even so, also in light of the often very real and serious problems that set the tone for much reporting on migration and integration during the pandemic, for a complete picture—and if at all relevant and possible—we also need to identify and discuss other types of changes as might occur. Such reports are far fewer in number, yet these include observations on the importance of essential workers, where a shift in focus from those with high qualifications to those who allow production and public services to weather the crisis can be observed (Anderson et al., 2021; Macklin, 2022). This, along with the noticeable difficulties that many industries, including critically those that often employ migrants, have already experienced in securing a workforce once the initial impact of the pandemic wore off could count as changes that, in some sense, put things right. After all, it

sends a signal that we should also value those engaged in occupations that do not carry as much prestige or allow for generous pecuniary rewards—and that how employers or society treat employees in time of distress does matter for the ability of society and its firms to bounce back. Similarly, regulatory changes that allow migrants a more secure existence in destination communities are noted (Triandafyllidou, 2022). The insight that we are all very much connected and that there might be other values than those upheld by consumerist society are other potential candidates.

On balance, migrants and their families—particularly those in precarious work or subject to uncertain status with respect to the right of residency—were clearly amongst those most heavily impacted by both the coronavirus and the measures taken to stop the pandemic. To the extent that the effects were immediately material, as was clearly the case, could it be that some of these effects might have a lasting impact on the status and fate of those groups? As outlined in the introductory chapter of this volume (Lerpold et al., 2023), although we limit our scope to the most affected, international migrants, there are a barrage of questions that came across as potentially relevant and worthwhile. Though it is not possible to address all questions, let alone to come up with exhaustive and solid answers that cover not just those countries and settings that have provided the best prospects of getting close to the issues at hand (not necessarily those that would provide the most enlightening answers), the questions in the section on temporary or permanent impact of the Introduction can be grouped into several categories.

The first concerns issues of demography. While immediate impacts are often assessed by recourse to the number of infected, could the excess mortality found in the wake of the pandemic (Wang et al., 2022) have a more lasting impact? Or, conversely, that the effects of the pandemic might be trumped by structural conditions that, unlike individuals experiencing the pandemic, were effectively immune to the latter's long-term consequences. Migration, of course, is not just the mechanical movement of people from one place to another, with those taking place within a country typically dwarfing international movements by a considerable margin. It is also about individuals who experience a need or desire to move, whatever the reason. As they move, they face the need of gaining some form of foothold wherever they might end up. Historically, this is typically a case of establishing oneself in an expanding urban area or immigrating to lands of greater promise (or lower levels of harassment, as the case might be). In the past, host country economic and social assimilation,

rather than multiculturalism, was essentially taken for granted as the consequence, irrespective of it being desirable or not (e.g. Glazer, 1993). We now believe that we know better, with debates over assimilation or multiculturalism and its impact on integration high on the agenda of both researchers and policymakers. This then forms our second area of interest, migration and integration, however conceived.

One reason why issues of integration are ever more important is that in the world of 2023, the opportunities for maintaining contact with those left behind are so much better than was the case during previous periods of great international migratory flows; ‘digital kinning’ (Baldassar & Wilding, 2020) may not have solved all problems of distance care and caring (e.g. King & Vullnetari, 2009), but it clearly lowered the threshold for maintaining contacts across both short and long distances. In that sense, international migration is now more like domestic migration and urbanisation. Since the 1990s, transnationalism has been the favoured framework within which this is assessed (Glick Schiller et al., 1992). As such, even though it might seem straightforward to keep a strong connection with the societies migrants were previously, and continue to be, attached to, the reality is that it is anything but. For one thing, it might not just include contacts and activities in two countries, but many more. For another, it upsets neat binaries, such as migration versus mobility, or clear-cut forms of migration. It also raises issues of synergies and tensions, just as it may well affect a sense of belonging. In short, transnationalism raises many issues and the pandemic has certainly served to put additional spanners in the works, beyond those related to the traditional ebb and flow of administrative hurdles typically affecting the progress of international migrants throughout the ages.

Perhaps it is best for others to address whether this also rubs off on the attitude of native-born relative newcomers or if it, in some sense, makes the full commitment to the host environment less pressing or attractive. Yet the reception at destination and how immigrants react to it (Verkuyten, 2016) is a factor to reckon with. In this context, current residents, be they native-born or relative newcomers, their organisations and officialdom, are all relevant. Importantly, it is not only a question of red carpet versus red tape, but also sentiments and identification. How do locals and natives react to inflows of migrants, how are migrants received and how do the different groups perceive themselves and others? The pandemic has served to put the spotlight on some of these issues, ranging from open xenophobia, racist slurs and outright violence to unconscious biases and



discrimination. It also includes diaspora politics and loyalties, the ability to move and how migrants can support their families back home. Thus, pecuniary remittances are an important adjunct here, alongside the social equivalent. Indeed, perhaps also reverse remittances might be affected?

### EMPIRICAL FINDINGS AND GENERAL INSIGHTS

Although it took 50 years of migration between the imperfect democracy of Mexico and the more established democracy of the United States for 10% of all persons born in Mexico to end up in the United States, it took just five years for 10% of the population to exit Venezuela in response to decisions taken by the autocrats Hugo Chávez and Nicolás Maduro; and it took just one month for 10% of Ukraine's population to relocate abroad in response to Vladimir Putin's autocratic decision to invade. (Massey, 2023, p. 73)

Although migration might take the form of slow-moving processes, it may likewise be triggered by unexpected critical events that turn normal conditions upside down within a matter of hours or days. Massey explicitly refers to the at times unexpected decisions of autocratic rulers unconstrained by due political and democratic procedures. He therefore implores fellow migration scholars to establish a 'greater engagement with political sociology' (Massey, 2023, p. 72), but also notes that the same unpredictability can emanate from other sources. Natural disasters are a case in point. Consider, for instance, the effects of climate change compared to earthquakes or volcanic eruptions.

Starting in early 2020, one such critical event has towered above most other: the appearance on the world scene of Covid-19. Declared a pandemic by the WHO on 11 March 2020, in many parts of the world it quickly served to change normal routines into something extraordinary. Groping in the dark, societies struggled to find ways of containing the virus. Other than observing what others did, under similar conditions of uncertainty, not much by way of prior experience was at hand to draw upon (Sebhatu et al., 2020).

Indeed, it took a while before a modicum of normalcy returned and, in some respects, we may never again return to the previous status quo. As at the time of writing the pandemic's impacts have not completely run its course, we cannot know for sure. Early observations, some of which are detailed on the opening pages of this chapter, suggest that the impact was heavily differentiated. Alongside those of old age, suffering from prior adverse health

conditions and comorbidities, migrants appeared to rank amongst those most heavily impacted. However, as migration is not a unitary phenomenon, different groups of migrants were also differentially affected.

This forms the background to our invitation to a diverse range of scholars (1) to consider the effects of the pandemic on past and current trends in international migration and integration and, if possible or worthwhile, (2) to try and identify significant impacts that might be with us as the coronavirus pandemic impacts, presumably, recedes. As this initiative was taken at the point when vaccines had become available, there was a sense that we might have weathered the worst and that there might be an end to the pandemic in sight. Thus, it should be possible to assess not just the immediate effects on various dimensions of migration and migrants' lives but perhaps also allow a reasonable chance of thinking about what the future might hold.

Recognising that it is not at all possible to address all topics related to trends in migration and integration potentially impacted by the pandemic, we cast the net wide and we attempted to include phenomena of very different character, if it could help us shed light on a core, yet often perceived as contentious, issue, that of migration and integration (e.g. Saharso, 2019). The results, reported in previous chapters of this volume, are structured to accommodate the logic of moving from macro issues to those more micro-orientated in nature. This mirrors "broader processes of development and social transformation" and those that reflect "(1) capabilities and (2) aspirations to migrate within a given set of constraints" (de Haas et al., 2019, p. 43), respectively. In other words, we move from the (potentially or notionally) stable to the possibly more transitory, from the more predictable to phenomena that also under normal, calm circumstances might be liable to change over short periods of time.

As far as the objects of study in the social sciences are concerned, and our ability to make forecasts, it is probably fair to say that demography is about as good as it gets. Often it is possible, even in the face of non-trivial changes in reproductive behaviour or mortality, to look a generation or so into the future. Adding migration increases the complexity, of course, and it all becomes more fluid. Yet the difference between stocks and flows implies that it takes time to build momentum. In the book's first contribution, by Douglas Massey, factors such as economy, environment and governance are added to the calculation. All of these, on their own or in combination, have the potential to influence demographic developments, in general, and migration, specifically. It appears that these structural

factors are such that they are likely to trump any lasting changes that the pandemic might produce. Although neither geography nor demography is destiny, the relative proximity of the main future centre of global population growth and areas of comparative stability and affluence will imply a continued focus on migration across the Mediterranean and along other well-established migration corridors. Indeed, to the extent that trends since the turn of the millennium imply a “pattern of growing threat-based movement relative to opportunity-based migration continues”, not only Africa but also “Western Asia, South Asia, and portions of Central and South America will figure prominently as likely sources of future migration” (Massey, 2023, p. 70). If so, it will have implications for both sending and receiving areas.

It is precisely at the point where migrants meet the host environment and those who consider their right to be there, by birth or by virtue of some other attribute, as a given, that migration and integration combine to create a success story or its direct opposite. As contentious as the issues surrounding integration might be, Penninx (2019) reminds us that it is not just useful to keep the policy world and the world of research apart, but also to move beyond inclinations of confirmation bias or a reliance on simple one-dimensional quantitative indicators. The pandemic added yet another dimension to what is already considered a complex issue that is best tackled in an open-ended and open-minded manner. As Bilgili et al. (2023; cf. Freitag & Hofstetter, 2022) show, various groups of migrants found their position in host society changed in non-trivial and often adverse ways. In parallel to encouraging examples of constructive diaspora diplomacy and politics (also e.g. Jindal et al., 2023), many migrants found themselves increasingly marginalised and often ostracised. As we will return to the issue of discrimination below, for now suffice it to note that support and encouragement from home, along with calls for the diaspora to help, was one immediate reaction, especially as the pandemic served to close borders and increase the risk of groups being pitched against one another.

In host societies, where the picture is more mixed, the pandemic has often served to play into the hands of pre-existing divisions in society or added a twist to ongoing ideological debates. The protectionism and nationalism that was clearly on a rise prior to 2020 got an additional boost as the supply of, and access to, protective gear, vaccines and many other things was suddenly couched in terms of national survival no less. It would not be surprising if the pandemic had an impact on long-standing debates

on ‘the good society’ and how best to achieve it. Few studies document or consider such impacts, other than its connection to various forms of extremist political positions and actions that, as often as not, target migrants along specialists and politicians seen as responsible for lockdowns and other restrictive measures (e.g. Davies et al., [forthcoming](#)). Visible, and dangerous, as extremism is, it may prevent us from seeing more mundane and far less destructive expressions of such shifts. Helping us fill such lacunae, several research initiatives have been launched, for instance looking into the policy response of the EU (e.g. de la Porte & Heins, [2022](#)). While pan-national policies and common initiatives are not always spectacular, they do play an important role for their member states and their development. Put differently, in addition to fundamental principles (such as on free movement), there are deeply held views, indeed paradigms, that have received less attention even though they have not remained unaffected by the pandemic.

Thus, Jerneck ([2023](#), this volume) brings the potential for a change that, at first glance, might seem less seismic. Looking at expressions of ‘welfare chauvinism’ and how it interacts with notions of migrants representing a cost to society, he identifies a possible source of a paradigmatic shift in favour of not only seeing the reception of refugees and other migrants as a drain on society. After all, the experience of the pandemic (like that of the financial crisis in 2008) was one of liberal public expenditure expansion without destabilising the economy. As he focuses on Sweden, this might be explained, indeed explained away, by the positive result of the prior regime of austerity: a very low public debt-to-GDP ratio. However, he argues that the inflation we have since seen return is driven by supply-side issues rather than by the expansion of public expenditure. While our ability to assess the relative importance of various sources of inflation will have to wait for more solid evidence to be assembled, for now this suggests that the pandemic might help put the debate on the costs and benefits of migration to host societies on a slightly different footing.

The societal level not only encompasses debates such as these, but also more formal arrangements. To use a favourite of institutionalist approaches, both formal rules and social norms feature prominently. Amongst the former, legislation is a core consideration and developments during the pandemic often play out here. At times, policies designed to protect and support the population required support or justification by law or occasioned new legislation. Precisely because these addressed issues of mobility, they came to impact migrants as well. As related previously, legislative

provisions of this sort had to be adjusted considering developments deemed of societal importance (see the various contributions to Triandafyllidou, 2022; cf. Szelewa & Polakowski, 2022). Thus, pre-existing legal rules were subject to revision or debate, one example being the (temporary?) re-evaluation of occupations that were seen as essential. Another, rather different, example is the Swedish ‘High School Law’ allowing unaccompanied minors without asylum status to complete upper secondary school and to remain in the country provided they found a permanent job within six months of graduating. As Bucken-Knapp and Zelano (2023, this volume) describe, the pandemic made it increasingly difficult for these individuals to find first permanent jobs, especially in the hospitality sector that was severely impacted during the pandemic. Intricate as the debate might seem—and it was not always flattering to those who participated in it—the early observations that migrants were particularly badly hit by the labour market conditions as they evolved during the early stages of the pandemic did little to ease the tension. As labour markets picked up in 2021 and 2022, when the most drastic measures to counter the pandemic were halted across most countries, it remains to be seen how national and international labour markets are shifted—or not—due to changes seen during the pandemic. Will guest workers and seasonal labourers return after a few years of travel bans and hurdles, given the precarious work conditions this type of labour often entails? Will the segmented nature of national labour markets with immigrants typically occupying low-skilled positions shift and, if so, what is the impact of new and stricter migration legislation? Further, will the acceleration of pre-pandemic trends, such as digitalisation and related job polarisation, continue (Goos et al., 2014)?

National migration policies, good or bad, require implementation. Early in the pandemic, the ability to implement policies as formed before the virus became difficult for those practically responsible for carrying out migration laws. Malm Lindberg (2023, this volume) describes experiences in return and deportation implementation, especially various legal and mobility issues in implementing policy during the pandemic. It was not just the travel restrictions in place and the lack of available flights, but also the policies of the countries of origin that played an important role. The Covid-19 pandemic has been characterised by unexpected and continuously changing circumstances with implementation hinging on a constant bidirectional information flow between policymakers and front-line staff. This is a useful supplement to pioneering research by Mencutek (2022) on return migration during the crisis: by focusing on the aspirations of

migrants—including irregular and undocumented migrants—the perspective of policy implementing agencies is, less usefully, left out.

The hospitality sector is frequently seen as an ‘entry path’ for individuals with limited domestic labour market experience, including immigrants. As Kazlou and Wennberg (2023, this volume) document, jobs within hospitality are strongly segmented along both ethnic and gender lines with migrant males occupying jobs characterised by technical requirements of a more routine character, while women—especially native—are primarily occupying jobs requiring social skills, such as communication and customer interaction. As the nature of these jobs continue to shift due to digitalisation and the permanent closure of workplaces, a critical event like the pandemic may lead to sustained increased requirements for technical skills in the sector. While these changes might offer potential for immigrants, as it decreases requirements for communication and language skills, these are also positions that can be readily rationalised. At the same time, working conditions and low wages in the hospitality sector are often considered unattractive, with employers around the world struggling to recruit after the pandemic lockdowns. This would seem to suggest that migrant workers in the sector are in a fairly good position to not just meet labour market demand but also achieve improved wages and working conditions. However, the proliferation of non-regulated and illegal workers alongside comparatively low unionisation rates among migrant workers in hospitality, as documented by Bender (2023, this volume), also means that the bargaining position of employees is much weaker than in other industries. Although it is too early to assess the final outcome, including the possibility that many of the foreign-born have actually weathered the employment crisis generated by the pandemic fairly well (see e.g. Andersson & Wadensjö, 2022a, 2022b), the tenor of the discussion provides ample evidence of the multifaceted nature of the labour market integration of migrants.

Following the suggestion of Penninx (2019), the reception and integration of migrants within the new setting can be assessed at the level of societies (or the institutional level, as he labels it) or individuals. He also recognises a collective level that sits in-between and includes host society organisations of various sorts. Again, it is only two years into the pandemic that research on the way organisations have approached the twin issues of migration and integration during these unusual times is beginning to appear. This includes two contributions to the present volume, both putting the spread of the coronavirus vis-à-vis trade unions, their manner of organising and their stance with respect to migrants and migrant workers

at the centre of their research. As trade union workings and engagement varies depending on national context, public welfare state systems and employment laws, the challenge to economic and social inclusion of immigrants during the pandemic became even more visible. Marino et al.'s (2023) chapter on trade unions in France, Italy and Spain and Bender's (2023) on trade unions in Sweden both show that migrants were especially prevalent in those sectors most negatively affected by the pandemic. That said, outcomes, even during the pandemic, are contingent on strategic pre-pandemic decisions. While trade unions in France, Italy and Spain have specifically targeted immigrants with territorial and spatial inclusion strategies since the 1990s, this was not the case among Swedish trade unions. Although blue-collar trade union density in Sweden increased during the pandemic, partly because of emergency changes made regarding the length of membership required to obtain unemployment benefits, membership is still more strongly related to labour market sorting than to being an immigrant or being native born (Bender, 2023). It remains to be seen how the EU Commission's 2022 proposal on adequate minimum wages included in the European Pillar of Social Rights initiative will impact the trade unions and their strategies regarding immigrants in the case countries.

Of course, the unions are not the only types of organisations that may engage in questions of migration and integration. Another example, also drawn from the present volume, are the so-called work-integrating social enterprises (WISE) with hybrid business models. This is the focus of Nachemson-Ekwall (2023, this volume), who discusses the conditions for those the furthest away from the labour market and how they might secure a foothold. While the ultimate effects of the pandemic remain to be seen, the consequences of the spread of the coronavirus have made it still more obvious that alternative ways of achieving integration should be contemplated; traditional policy interventions often fall short.

It is in a context like this that the various expressions of transnationalism play out. A key insight is that no matter the nature or extent of host country initiatives, from the migrants' perspective, it always takes place in relation to some other setting or context beyond the reach of host country policy interventions. Not only is the diaspora engagement that Bilgili et al. (2023) document a component here, but so is the core reality of transnational living. As Erdal (2020) notes, the simultaneity and friction, be it antagonistic or productive, experienced by migrants is at the heart of how the diverse social fields that migrants owe allegiance to influence the range

of actions open to them. Implying both opportunities and challenges, including access to material support and exposure to various constraints, it also embodies fundamental questions about identity and belonging.

Since the 1990s, remittances and remitting behaviour have taken pride of place. As a visible expression of transnational living and solidarity, it is also hailed as a sounder and more individually reliable alternative to development assistance and potentially more important than foreign direct investment. In parallel, it is recognised as an expression of the strong bonds between individuals, families and communities often separated by considerable distances. Thus, it comes as no surprise that during the early phases of the pandemic, concern was raised over the negative impact that the disruptions might have, not least in labour markets. As noted by Bilgili et al. (2023), some of these fears have been laid to rest. Even so, they indicate that, in other respects, remittances have not necessarily gone unaffected. Not only has the salience of reverse remittances (Mazzucato, 2011) been heightened by the pandemic but the nature of social remittances (Levitt, 1998) may have also been affected. We can even speak of reverse social remittances, as information on how the pandemic is fought in other places filters back to migrants who find themselves exposed to conflicting information on how best to behave or what stance to assume on, for instance, the wearing of masks, social distancing and vaccinations.

That this might be important is amply illustrated by Rogstad (2023) and Valdez (2023) in their respective chapters in this volume. Beyond labour market participation, health as a proxy indicator of integration (though not necessarily correlated, as Rogstad's chapter shows) is commonly understood among OECD and EU nations (Ager & Strang, 2008; OECD/EU, 2018). Both chapters focus on specific immigrant groups and their vaccination levels relative to native born. In common, the impact of transnational relationships with family and friends in origin countries and their partly homophily formed social networks in host countries seems to play a significant role. Indeed, in both Norway and Sweden, where vaccinations were highly promoted, free of cost and, ultimately, readily available, the adage 'birds of a feather flock together' seemed evident in whether to vaccinate and or not. As groups, Polish immigrants in Norway and Somali immigrants in Sweden had lower vaccination levels than native-born residents, with respective rates on par with levels in their origin countries. Differing levels of trust in public institutions seem to be sustained across more recent immigrants to Norway and Sweden. A contrast, though, are the Pakistani immigrants to Norway, who arrived in the 1960s



and 1970s: their vaccination levels are on par with native-born Norwegians. Another commonly used indicator of integration is that of housing. Valdez (2023) connects vaccination levels with the built environment in a novel way, shedding light on yet another dimension.

Finding themselves at the intersection of multiple social fields, as Erdal (2020) notes, migrants may indeed feel the effects of friction. If so, the existence of discriminatory behaviour exercised by the majority population does not make it easier. Irrespective if it is thought of in the strict sense of a “disadvantage, harm, or wrong” imposed on someone based on that individual’s “membership in a certain type of social group” (Altman, 2020: Sect. 1) or some wider reading, the phenomenon is, of course, not a novelty. This is true across different types of discrimination, as outlined by Ahmed et al. (2023, this volume). Rather, the question is if the pandemic was instrumental in introducing any changes to it, be it the incidence or nature of discrimination. Usefully summarising the yet rather sparse literature on the topic within the discipline of economics, a main message is that the long-recognised categories or types of discrimination remain relevant during the period under study. Indeed, there are indications that certain forms of discrimination may have been aggravated as the pandemic made landfall. If so, this is also in line with the observations of Bilgili et al. (2023) and, for instance, early assessments investigating access to public health services (Marchi et al., 2022).

Extending this to comprise not just disadvantages (e.g. seeing someone else gain access or be selected for a position that is more meritoriously yours) but also the harms and wrongs that Altman (2020) includes under the heading of discrimination, the pandemic is a proven conduit for xenophobia, increasing racism, hate and, indeed, violence directed against foreigners. As Boris (2022) notes, there is a long history of blaming migrants, regardless of whether the individuals are indeed migrants or just perceived to be such. No doubt in part because the coronavirus pandemic is assumed to have originated in China, Bilgili et al. (2023) find that East Asians have suffered consequences. Any privileged position within the ranks of the foreign-born that East and South-east Asians may have enjoyed—as the ‘model minority’—quickly evaporated. Then again, as Osanami Törngren et al. (2023, pp. 335–336, this volume) emphasise in their study of Sweden, there is “no indication that Asians are a model minority group, succeeding and excelling in employment and education, especially when we look at the children of immigrants.” Apart from harassment of a similar type to that seen in the Netherlands, the pandemic itself put this set of the

foreign-born apart from other migrant groups. They were subject to the same restrictions as everyone else, with the added observations that East, South-East and South Asian groups like all other members of transnational communities suffered the consequences of the restrictions introduced in the countries where their kin and friends resided.

It remains to be seen if this is a temporary consequence of the pandemic or something that will stay with us also once Covid-19 and its many variants become just yet another source of seasonal flu. While we are keen to leave any forecasts on the future of the virus itself to those who have the requisite expertise to make such pronouncements, it is unfortunately unlikely that similar discriminatory behaviour observed during the coronavirus pandemic will recede or disappear. Instead, and unlike the case of demography, where we started, there is a distinct risk that the observed deterioration will remain with us for a long time to come due to ingrained structures and related ratchetting effects. In that sense, the rear-view mirror might tell us something about future after all.

## FINAL WORDS

As the literature on the consequences of the coronavirus pandemic multiplies, it is increasingly clear that Covid-19 has caused many changes to our world. Although we should be careful to not express it in quantitative terms, be it in absolute numbers or proportionally, in the wake of the pandemic, it is easy to sense that the emergence of entirely new phenomena or trajectories are rare. Instead, contributors to the present volume and those to the wider literature emphasise that many of the developments observed imply a strengthening of trends already in progress or phenomena already present. The relative importance may have shifted, but there is little to suggest that entirely new phenomenon dominate the landscape arising from the rapid spread of a deadly virus and the measures taken to stop or otherwise slow its advance. From access to labour markets and public health services, to the increase of nationalist and protectionist sentiments, to discrimination and racist actions, problems may well have become more acute, more visible and more damaging; yet few would claim that any of these did not exist prior to the arrival of Covid-19. In parallel, there is little to suggest, in the contributions to this book or as yet in the wider academic literature on the impact of the pandemic, that there is a permanent re-evaluation as to whom is seen to perform essential work, that there is a return to regarding labour an asset rather than a cost or that human trafficking has been stamped out.

Even the early observations of reduced migration flows do not necessarily represent a clean break with the immediate past. Although the closing of borders and the reduced opportunities for all forms of mobility that followed in its wake would suggest a break with previous trends, we are not in an ideal position to tell. At first glance, while published statistics seem to imply substantial reductions in migration flows, figures as exist are either partial in geographical coverage or are built on assessments of changes in stocks of the foreign-born. Deducing flows from such data is fraught with problems and, further, the counterfactual is not available. Yet, as we move away from quantitative information and the time lags that are an inevitable part of the production of statistics, the observer trying to make sense of what is going on also faces other obstacles. Out of necessity, studies rarely provide more than a snapshot of what is happening in one place over a short period of time—effectively a single data point or, at best, a cross-section rather than an assessment of developments over time. This is certainly not desirable, but one cannot do much about it, especially at a time when there is a need to find one’s feet here and now. Indeed, this very volume was inspired by the opportunity to take stock of our extant knowledge and the impact of the pandemic through a mirror broken by the Covid-19 pandemic, and the need to make the best possible out of it. In this way contributing to a growing body of research that, step-by-step, adds to the accumulated repository of knowledge about the effects of the critical event that the pandemic represents. Thus, like any other project, the present volume represents work in progress, albeit with an inevitable deadline attached. The baton is now passed to others in this never-ending relay race in the pursuit of knowledge.

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