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# Immigrants and Ethnic Minorities

## European Country Cases and Debates

REPORT



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# Abstract

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The immigrants in the old EU Member States and ethnic minorities, in particular the Roma in the new EU Member States, face various risks of labour market and social exclusion many of which are of the same kind for the two groups. Coping with them presents rather important challenges to national governments. We look at labour market and social exclusion risks of immigrants and Roma, who are a key ethnic minority in the European Union, present an overview of latest immigration or minority policies, and describe and comment on some ongoing debates on the topic. Old emigration countries such as Spain and Finland have lately turned into immigration countries. However, the historical backgrounds and political responses in these countries are rather different, the main background factor bearing an influence on the responses is the volume of the phenomenon: today Spain is the leading immigration country in the European Union and the main entry into the EU for third country nationals, while in Finland the shift is much less dramatic. Hungary, Slovakia and Romania have all major Roma minorities, whose volume is somewhat controversial and who are disadvantaged in education and on the labour market; they show a strong benefit dependency, still, many of them live in extreme destitution in these countries. The Roma policies in these countries have varied during the transition and EU accession periods, but few have reached genuine results, thus, much remains to be done in order to develop effective socially inclusive policies for the Roma.

The articles have been written in the context of Network of Excellence Reconciling Work and Welfare in Europe (RECWOWE), funded by the 6th Framework Programme (FP6) by Simo Mannila (National Institute for Health and Welfare, Finland), Hans-Peter van der Broek (University of Oviedo, Spain) and Vera Messing and Zsuzsanna Vidra (Hungarian Academy of Sciences).

Keywords: immigration, ethnic minorities, Roma, social exclusion, European Union

# Tiivistelmä

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Artikkelikokoelma pohtii maahanmuuttajien ja etnisten vähemmistöjen tilannetta Euroopan unionissa muutamien maakuvausten avulla, jotka käsittelevät Espanjaa, Suomea (muutamien Ruotsia ja Norjaa koskevin vertailutiedoin), Unkaria, Slovakiaa ja Romaniaa. Maahanmuuttajat ja etniset vähemmistöt, erityisesti romanit Euroopan unionin uusissa jäsenmaissa, kokevat samankaltaisia sosiaalisen ja työstä syrjäytymisen uhkia, ja tämä tilanne on samalla tavalla haasteellinen kansallisella tasolla eri maissa. Artikkeleissa kuvataan maahanmuuttajien ja etnisten vähemmistöjen, erityisesti romanien sosiaalisen ja työstä syrjäytymisen uhkia, luonnehditaan maahanmuuttopolitiikan ja etnisiä vähemmistöjä koskevan politiikan kehitystä ja kuvataan muutamia ajankohtaisia keskustelunaiheita, jotka eri maissa liittyvät maahanmuuttoon tai etnisiin vähemmistöihin. Maat, joista perinteisesti on muutettu pois, kuten Espanja tai Suomi, ovat nykyään maahanmuuttomaita. Niiden historia ja politiikan ratkaisut ovat kuitenkin melko erilaisia, ja tärkeimpiin erottaviin tekijöihin kuuluu ilmiön laajuus: tätä nykyä Espanja on Euroopan unionin volyymiltaan tärkein maahanmuuttomaa ja myös Euroopan ulkopuolelta tulevien pääasiallinen tuloväylä, kun taas Suomessa muutos on ollut vähemmän dramaattinen. Unkarissa, Slovakiassa ja Romaniassa on suuria romanivähemmistöjä, joiden koosta on erilaisia käsityksiä ja jotka ovat muita heikommassa asemassa koulutuksessa ja työmarkkinoilla; heidän toimeentulonsa riippuu myös paljolti erilaisista etuuksista ja he elävät silti syvässä köyhyydessä. Näiden maiden romanipolitiikat ovat vaihdelleet transition ja Euroopan unionin lähentymisprosessin aikana harvat niistä ovat saavuttaneet merkittäviä tuloksia ja tehokkaan sosiaalipolitiikan kehittäminen vaatii vielä työtä.

Artikkelit ovat syntyneet Euroopan unionin 6 puiteohjelmahankkeen (FP6) Reconciling Work and Welfare in Europe (RECWOWE) työnä. Kirjoittajat ovat Simo Mannila (Terveyden ja hyvinvoinnin laitos), Hans-Peter van der Broek (Oviedon yliopisto, Espanja) ja Vera Messing ja Zsuzsanna Vidra (Unkarin tiedeakatemia).

Avainsanat: maahanmuutto/maahanmuuttajat, etniset vähemmistöt, Roma, sosiaalinen syrjäytyminen, Euroopan unioni

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# 1 FOREWORD

SIMO MANNILA, HANS-PETER VAN DEN BROEK, VERA MESSING

This publication is a result of cooperation in a research task of Network of Excellence Reconciling Work and Welfare in Europe (RECWOWE, see <http://www.recwowe.eu>), funded by the 6th Framework Programme (FP6). This project focuses on a number of actual themes, related on existing social and policy tensions in Europe, and pools and develops further scientific knowledge relevant to European social policy. These tensions are related to the interaction of employment and social security, which is often discussed as the problem of 'flexicurity'; to the interaction of work and family life, two key spheres of human life, but sometimes difficult to reconcile; to job creation in the context of global competition and maintaining high quality of working life; and to synthesizing these discourses in the existing or new paradigms of social policy. The project brings together over 20 partners from 17 European countries.

The task on the situation of immigrants and ethnic minorities in the European Union as well as policies and debates related to them was carried out in RECWOWE during 2007-09 by mainly three persons, Adjunct Professor Simo Mannila of National Institute for Health and Welfare (Helsinki, Finland), Dr Vera Messing of the Hungarian Academy of Sciences (Budapest) and Dr Hans-Peter van den Broek of the University of Oviedo (Spain); in this work and in this anthology participates also Ms Zsuzsanna Vidra of the Hungarian Academy of Sciences.

Dennis Bouget of the University of Nantes defined in a RECWOWE workshop Tensions between Work and Welfare in Nantes 2009 the following tensions important for the situation of immigrants and ethnic minorities:

- The generational consequences of migrations and growing presence of ethnic minorities. Immigration into Western welfare states is changing the population structure: immigrants tend to be younger than the basic national populations. A main trend in social rights has been increasing irrelevance of national citizenship as far as the entitlement to welfare benefits is concerned.
- Economic protectionism and social protectionism. The current financial crisis seems to give ethnicity a new role in social tensions, which may lead into social conflicts.
- Political risk under the present financial crisis may lead into economic and social protectionism which entails also a danger of extremist politics, the results of which already seen in some countries.
- Discrimination on the labour market at all levels of human capital. The nation states seem to be unable to accommodate growing ethnic diversity which makes the European Union's predicament of migration, welfare, and citizenship more complex than the American experience (cf. Schierup, Hansen & Castles 2006).

These tensions show the actuality of immigration, immigration policy and related debates. This paper brings together five articles rather different from each other by style and topics; it is a report on 'the state of the art' of research, data sources and policies in some European contexts. The anthology highlights socio-political issues related to immigrants and ethnic minorities from the perspective of countries which are seldom in the key focus of European discourse defined more often by countries such as the United Kingdom, France, Germany or Italy. The first two articles describe the problems of immigrants and corresponding policies and debates in Spain, Finland and to a certain extent also in Sweden and Norway. The following articles highlight the situation of Roma in some new Member States of the European Union i.e. Hungary, Romania and Slovakia.

The integration of immigrants and ethnic minorities in society depends in no small measure on their participation in the labour market – an integration that should be supported by public services (e.g. education, health care, social care) as well as anti-discrimination policy. In most old Member States of the European Union, social exclusion and discrimination in the labour market, as well as in other spheres of life, are risks faced disproportionately often by immigrants and their families. In the new EU member States, immigration is of minor social relevance, it is mainly domestic ethnic minorities such as, in particular, Roma, who suffer from social exclusion and discrimination. The common feature of both immigrants and ethnic minorities, however, is their high risk of being 'othered' by the ethnic majority and excluded from the labour market.

The country cases to be presented illustrate mutually very different situations as follows:

- Spain is a 'new immigration country' i.e. immigration is rather new to Spain but it has grown dramatically during the past years, and presently Spain is the main 'entrance gate' to the European Union;
- Finland, a country with a Nordic welfare model in social policy has changed from a long-time emigration into an immigration country but the immigrant flows are still rather modest; in the chapter on the Nordic region, Sweden and Norway are also described as two different cases of Nordic immigration history and policy;
- Hungary and Slovakia are Central European countries where the presence of the Roma is a challenge to developing integrative employment policy and welfare state;
- Romania hosts a quarter to a third of European Roma population which means that it faces a similar but even stronger challenge than Hungary and Slovakia; additionally, since its entrance into the European Union, it has been estimated that up to 3 million people are at least temporarily working abroad or search for better paying jobs in other EU countries.

For each of these countries, we shall analyze the situation of the immigrants or Roma in the national labour market and welfare system. We assess, whether it would be possible, on the basis of the existing literature to find tendencies towards social integration, assimilation, segregation or exclusion of immigrants or ethnic minorities (Roma). Integration vs. segregation may occur at different levels: in relation to occupation, salary, participation in trade unions and political organizations, factors such as nationality, education, gender, age may bear an influence on the outcome of the acculturation process.

The EU countries historical background as immigration or emigration states and the divergent challenges they face at the moment, are reflected in the academic, political and public debates on immigration and integration in these nations as well as in their immigration policies. Hence, we will also explore the immigration and minority policies and discuss the debates in the chapters that follow. Although our articles differ from each other, we want to emphasise our joint approach by a common list of references.

The contributions of this publication were written before the financial crisis we are facing in the European Union. This crisis most certainly bears an impact on the life of immigrants and ethnic minorities, and even more so on the national policies and debates on immigration and ethnic minorities. The present situation may give a possibility of an acid test to the European anti-discrimination policy and its national applications.

The authors would like to thank the RECWOWE Network of Excellence, and in particular, Professor Denis Bouget (University of Nantes), Dr Bruno Palier (Sciences Po Paris) and Professor Ana Guillén (University of Oviedo) for support.

## 2 IMMIGRANTS AND ETHNIC MINORITIES BETWEEN WORK AND WELFARE

HANS-PETER VAN DEN BROEK, VERA MESSING, SIMO MANNILA

This review will focus on tensions between labour and welfare and the labour market situation of immigrants in old Member States of the EU, but it also has a special focus on Roma in the new Member States of the European Union. We see the problems related to Roma integration in new Member States resemble in many respects the problems of immigrants; this may be even more true for the 2<sup>nd</sup> + generation of immigrants in old EU Member States. The problems of integration of immigrants in Central and Eastern European countries cannot be compared to those of the immigrants in the older Member States for various reasons. The immigrant population in the former group of countries is negligible (around 1% of the population), while in some of the EU-15 Member States immigrants number over 10% of the population. A large share of immigrants in the new Member States are very well trained, whose aim has been to find better paying jobs, and they rarely encounter social exclusion. Thus, if we focus on risks of social exclusion and discrimination across the EU, the problems typical of immigrants in many old Member States are experienced by Roma. This legitimizes our focus on the Roma as a special case of ethnic minorities and their vulnerability in our review.

### Population numbers: immigrants and immigration trends in Europe

Immigration in Europe is a rather heterogeneous phenomenon. There are countries with a long history of immigration, countries that have only recently begun to attract immigrants, and some others that have changed from emigration into immigration countries; there are also countries experiencing both large-scale emigration and immigration. In some EU Member States labour immigration is very common, while other countries receive more refugees and asylum seekers or persons on the basis of family reunification. In crude terms we may distinguish three groups of countries in the European Union: (1) North and Central(-Western) European countries with an old tradition of immigration; (2) new mass immigration countries in Southern Europe, which previously were emigration countries (in particular: Spain and Italy) and (3) countries in Central and Eastern Europe, where large numbers of people have emigrated to the old Member States of the EU in search for work, but which at the same time experience some immigration pressure from some countries on the eastern border of the EU-27 (cf. Laparra & Martínez,

2008). And in contrast to the first two groups of countries where immigration is an important political issue, interethnic relations are shaped primarily by the presence of the Roma in the third group of countries.

The countries with highest shares of non-native residents are small nations or microstates such as the EU-state Luxembourg, where in 2005 the share of non-native inhabitants was 37 %. In the European Union countries the highest numbers of immigrants were in Germany, France, United Kingdom, Spain and Italy. The fastest growing immigrant populations are now in Spain and Italy: for instance, in 2005 the share of immigrants was 10.8% in Spain but in 2010 it was 12.2% with an increase of some 800 000 persons in five years. EU countries with a share of immigrants between 10% and 25% were Latvia (19%), Estonia (15%), Austria (15%), Cyprus (14%), Ireland (14%), Germany (12%) and Sweden (12%), Spain (12% in 2009), France (10%) and the Netherlands (10%). In Norway the share of non-native residents was 7%, in Finland 5% (in 2009), while in the new Member States the shares were very low, for instance in Romania it was less than 1%. However, the European countries with highest numbers of non-native residents are not in the European Union, they are Russia and Ukraine (United Nations 2005; [http://en.wikipedia.org/wiki/Immigration\\_to\\_Europe](http://en.wikipedia.org/wiki/Immigration_to_Europe)).

The increase of numbers of migrant in the different EU countries is highly divergent. Figure 1 (next page) gives a broad picture of the migration influx in the first five years of the new 21<sup>st</sup> century. Immigrant status was defined on the basis of the country of birth.

In Spain, Italy, Ireland and Cyprus the migration inflows have the greatest relative impact on the countries' original population. On the other hand, while the absolute numbers of migrants who settled in Ireland and Cyprus seem to be relatively low, Spain and Italy have received two to three times as many immigrants as Germany, France and the United Kingdom in the first half of the ongoing decade. The new EU Member States in Central and Eastern Europe can all be found in the left-hand part of the diagram, where the relative and absolute immigration numbers are either extremely low or even negative: in Poland, Romania and the three Baltic republics emigration surpasses immigration. Finland and the Netherlands, which we address in this publication, are two EU-15 member States with quite low net immigration according to the indicators used.

Although Germany, France and the UK are the EU member States with the highest numbers of immigrants, the migrant influx to these countries from 2001 has become relatively modest compared to what is happening in Spain and Italy today. Many immigrants who enter the European Union through its 'Southern gates' may, however, continue to countries in Northern Europe, where salaries tend to be higher, unemployment rates lower and the welfare state more developed. However, in recent years Southern Europe has also become the final target for a great number of migrants from Latin America, Africa and new EU Member States. In several Southern EU countries the huge influx of immigrants has engrossed the

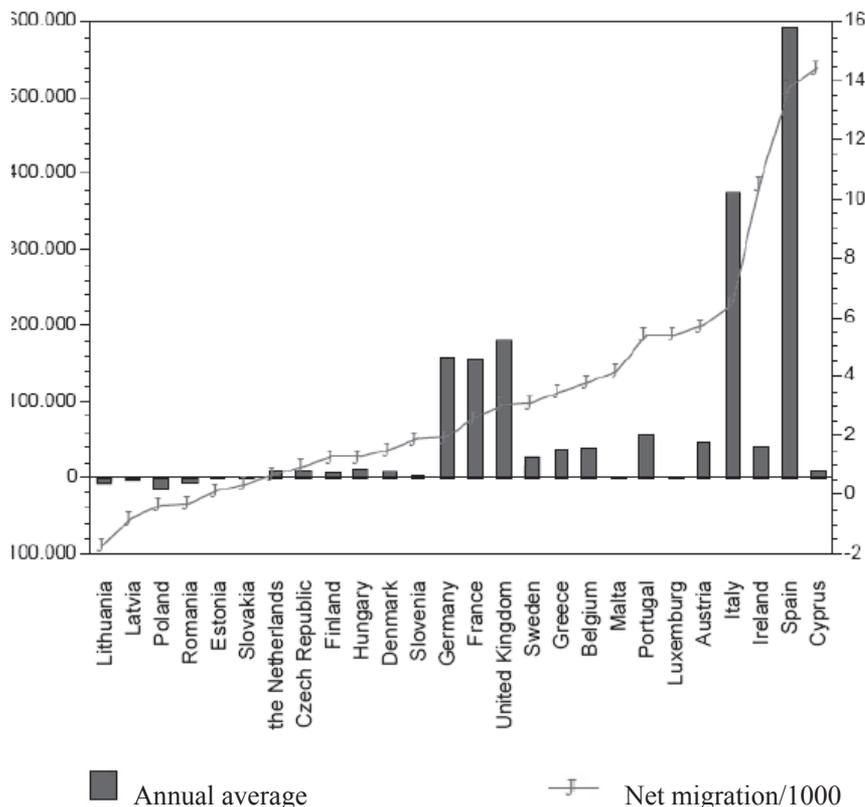
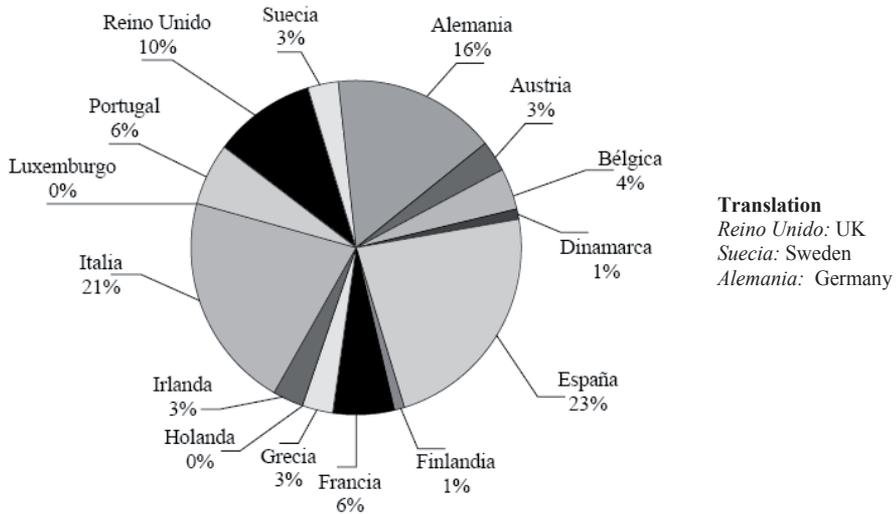


FIGURE 1. Migration in EU-25 + Romania. Average annual growth and net migration per 1,000 inhabitants (2001–2005) (Laparra & Martínez, 2008, 3.)

national labour markets and contributed to the expansion of the informal economy, while, in Northern Europe immigration has in recent years been increasingly often based on family reunification and asylum and refugee policy. Few countries have developed a policy specifically aimed at attracting highly qualified immigrants but some initiatives are found in many countries (Laparra & Martínez, 2008).

Figure 2 shows that in 2003 Spain and Italy were the countries that most contributed to the migration influx in the EU-15. Half of all immigrants who entered the European Union settled at least temporarily in the Iberian Peninsula or Italy. In comparison to this, the numbers of immigrants in the Northern EU States were small.

FIGURE 2. Contribution to net migration in EU-15, per country (2003)



(Eurostat, Statistics in focus, 3-1/2004, cited in CES, 2004, 16.)

From 2002 to 2006, immigration in the European Union grew by almost 25%. The countries where immigration numbers increased most were Spain, Italy and Ireland (cf. Herm 2008, 2). In the Netherlands, on the other hand, immigration declined during this period: the 2006 influx of newcomers was 11% lower than in 2002. In Finland, immigration has been increasing but is still rather low as compared to most of EU15. In 2006, all over the European Union about 3 million people settled in another country. This includes people who moved from one EU country to another. The following Figure 1.3 shows the origin of these immigrants according to continents and regions. Non-EU immigrants numbered some 1.8 million people, whereas immigrants from other EU member States (in the diagram, Romania and Bulgaria were already included in the EU) numbered a total around 1.4 million. In these numbers about half a million former immigrants who in 2006 returned to their home countries are not included. Note that the percentages given here refer to the new immigrants in 2006, not to the total numbers of immigrants by 2006.

Figure 3 shows that 40% of immigrants in the EU countries came from another EU country i.e. there is a great deal of transnational mobility in the European Union. Nevertheless, the share of European immigrants from non-EU countries was only 14% i.e. comparable to those coming from Africa, Asia or America/s.

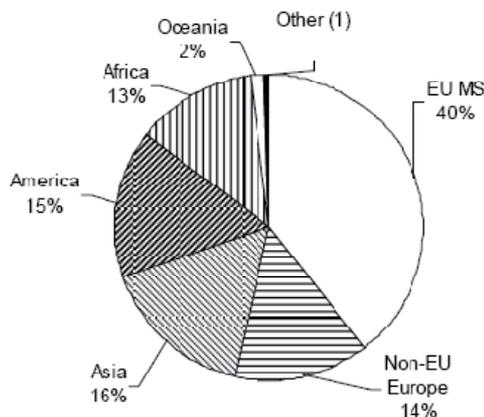


Figure 3. New immigrants by continents and regions of origin in the EU-27, 2006

(1) The share was less than 0.5% and the category “other” includes stateless and unknown citizenship.

(Herm 2008, 3, based on Eurostat and Migration Statistics.)

Among citizens of the EU-27 States, Polish migrants constituted the largest group with around 290,000 people; Romanians were the second one with some 230,000 migrants. Moroccan immigrants constituted the most numerous group – 140,000 people – among the newcomers of non-EU origin. The absolute net migration figures for 2007 in the EU27 show that it was highest in Spain with 684,000 and Italy with 454,000 net immigrants, followed by the UK (247,000) and France (100,000). The net migration rate was negative in Poland with a rate of – 138,000 and Romania with a rate of – 100,000; the net immigration balance was also negative in Bulgaria, the Baltic States and surprisingly in the Netherlands. In all other countries the net immigration rate was positive in 2007 (also in e.g. the Czech Republic, Slovakia and Slovenia). (El Mundo 25.5.2008.)

Some EU countries attract immigrants of a wide variety of origins, while others have appealed to a reduced number of nationalities. We may also say that “[c]itizens of some countries are attracted by several Member States, while others have only one main country of destination” (Herm 2008, 4). Something similar happens to gender: for instance, in Slovenia four times more immigrant men than women entered the country in 2006, whereas Cyprus received twice as many women than men (Herm 2008, 5).

There is also a wide variation in age among immigrant categories. The median age of EU migrants was in some countries 4 or 5 years higher than that of non-EU immigrants. These differences can be explained by, for instance, the historic relations between the (receiving) EU Member State and the country of origin, the economic progress in the target country and its sectoral differentiation, and cultural or linguistic proximity between the target country and the country of origin.

## Roma population in Europe

Figure 4 (next page) shows the estimated numbers and the relative shares of Roma population in various CEE countries.

In contrast to immigrants, the Roma have settled in Europe centuries ago. Despite this fact, some numbers of Roma – especially in countries of South-Eastern Europe – still do not have official documents or, consequently, full citizenship rights. The exact number of Roma is uncertain, for several interrelated reasons: inaccurate data collection on ethnicity, data protection regulations or their misinterpretation, and, most importantly, the reluctance of Roma to register their ethnic origin in censuses because of – historically motivated – experience of stigma. The vast majority of Europe's estimated 6-8 million Roma resides in the Central and East European countries, although there is a significant Roma population also in some old EU Member States: in Spain (700,000–800,000), France (280,000–340,000), Greece (160,000–200,000), the UK (90,000–120,000 incl. travellers), and Italy (90,000–110,000).

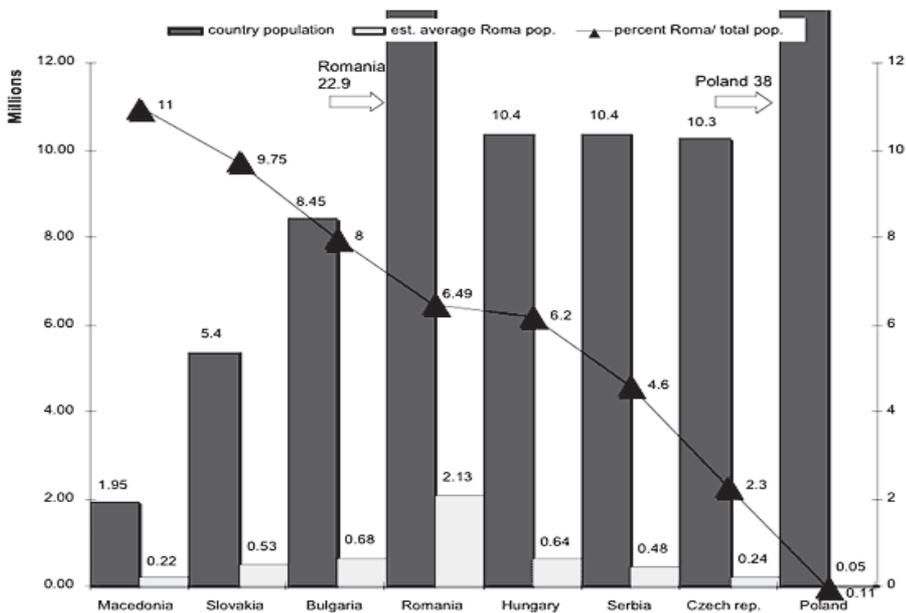


FIGURE 4. Average Roma populations in selected countries and their share in total population (2000)

(Source: <http://www.migrationinformation.org/Feature/display.cfm?ID=308.>)

## EU and national policies on immigration and integration

In several treaties and agreements, the European Union has laid down the common policies on migration and the competencies of individual member States. The 1992 Maastricht Treaty expressed an interest in establishing a common policy, but left the competencies of individual states in questions of asylum, immigration and internal borders as before, whereas the Treaty of Amsterdam (1997) took on a compromise to elaborate a common policy on immigration, introducing a special chapter (Title IV) on “Visas, Asylum, Immigration and Other Policies Related to Free Movement of Persons”, which stipulated the main measures such a policy should include. The objectives of a common EU policy on asylum and immigration were further agreed upon at the Tampere European Council of October 1999. Since Tampere, the common policy on asylum and immigration has consisted of the following basic elements: collaboration with countries of origin and transit; creation of a common European system of asylum; just treatment of citizens of third countries; and adequate management of migration flows. In relation to the point on cooperation with countries of origin and transit, it was decided at the Seville European Council (June, 2002) that in any future agreements between the EU and other countries clauses should be included on common management of migration flows and the compulsory readmission in case of illegal immigration. In 2003, the European Commission issued a communication on immigration, integration and employment “COM (2003) 336 final”, which stressed the need for a holistic approach to integration policies, focusing on the importance of social inclusion, economic and social cohesion and combating discrimination.

Today, in most countries with a long immigration tradition (e.g. France, the UK, the Netherlands), the children and grandchildren of the first immigrants participate in the national education system and immigrants are, as a rule included in the workforce, although there are cultural differences in immigrant women’s participation in paid work. Nevertheless, in several ‘old’ EU Member States, labour market and cultural-political integration not only of first-generation migrants but also of the second or even third generation has proven to be a rather difficult process. In a reaction to this, some of these countries have started to adopt coercive policies to promote the (‘civic’) integration of newcomers, such as the so-called ‘citizenship diplomas’ for immigrants in the Netherlands. In some other countries other forms have been adopted in order to promote the immigrants’ integration, e.g. in Finland there is a specific set of integration measures available for immigrants that will be described in the following chapter.

Challenges of integrating immigrants largely resemble to some of those posed by the integration of Roma in CEE countries. Their situation is similar in various aspects: low labour market participation, higher welfare dependency, low educational levels and consequently lower chances of employment, higher

participation in the semi-legal or illegal segment of the labour market. In the EU countries there are active labour market policies as well as education policies targeted to groups at risk of social exclusion with a special focus on Roma.

### 3 NORDIC IMMIGRATION POLICY AND THE NEW EMPHASIS ON LABOUR IMMIGRATION – THE CASE OF FINLAND AS COMPARED TO SWEDEN AND NORWAY

SIMO MANNILA

This article describes immigrants and their integration in Finland, and to a certain extent in Sweden and Norway; some Finnish debates on immigrants and immigrant policy; and the latest policy development based mainly on Finland with some all-Nordic perspectives. The article does not address but in passim the traditional ethnic minorities in Finland, Sweden or Norway (e.g. Roma and Sami in all three countries, Finns in Sweden and Norway). I start by a concise description of immigration research in all three countries.

#### Immigration research in Finland, Sweden and Norway – some key scientific bodies

Lately immigration and ethnic relations have become a very popular research topic in Finland. This has been supported by rather extensive research funded by the (previous) Finnish Ministry of Labour, a research programme funded by the Finnish Academy of Sciences focusing on ethnic relations, and there is also the Finnish Society for Ethnic and Migration Studies bringing together a large number of scientists on a multidisciplinary basis; the society also publishes a scientific journal in English. As of 2008 the immigration policy was transferred to the powers of the Finnish Ministry of Interior, and it remains to be seen what kind of impact this will have on Finnish research on immigration.

Some of the most interesting research centres in Finland working with immigration are the Institute of Migration in Turku ([www.siirtolaisuusinstituutti.fi](http://www.siirtolaisuusinstituutti.fi)) and the Centre of Ethnic Research CEREN at the Swedish School of Social Work at the University of Helsinki ([www.helsinki.fi/](http://www.helsinki.fi/)). The former institute has earlier focussed exclusively on Finnish emigration, but it makes an effort to develop also research into immigration; the latter body is e.g. a member of the IMISCOE Network of Excellence. Extensive studies into discrimination on the basis of ethnic origin have been carried out at the Institute of Social Psychology of the University of Helsinki (e.g. Jasinskaja-Lahti & al. 2003), and the Finnish League of Human Rights has a long time composed a yearly report on discrimination in Finland (e.g. Lepola & Villa 2007). As a new scheme of monitoring discrimination, this

reporting will in the future be tendered out by the Finnish Ministry of Interior. Some of the themes studied more thoroughly are the Russian-speaking, ethnically Finnish and Estonian immigrants in Finland, their risks of social exclusion and discrimination (Liebkind & al. 2004) and female immigrants between work and welfare (Martikainen & Tiilikainen 2007). The National Institute for Health and Welfare is presently starting a major study on immigrant health and well-being, focusing on Russian-speaking, Kurdish and Somali immigrants by the model of Finnish Health 2000 survey implemented earlier (cf. Aromaa & Koskinen 2003; [http://www.thl.fi/fi\\_FI/web/fi/hankesivu?id=22131](http://www.thl.fi/fi_FI/web/fi/hankesivu?id=22131)).

During the first years of the 2000s, Statistics Finland implemented a living conditions survey of four immigrant groups, Russian-speakers, Estonians, Vietnamese and Somalis (Pohjanpää & al. 2003; Paananen 2004), but there is no ongoing living conditions survey covering all immigrants in Finland. The yearly publication *Immigrants and Foreigners in Finland*, compiled by Statistics Finland on the basis of various register data contains some interesting data such as unemployment rates per immigrant groups (e.g. Nieminen 2006).

Nevertheless, Finnish research into immigrants and immigration policy is of later origin if compared to that in Sweden or Norway. This is due to the fact that immigration to Finland is also rather new as compared to that to Sweden or Norway, and the shares of immigrants in these three countries differ widely. In Finland, the foreign-born population numbered around 188,000 in 2006 (Maahanmuuttajat Suomessa 2009), in Norway (2008) 460,000 (Innvandrere i Norge 2009) and in Sweden (Statistiska centralbyrån 2007) 1,900,000. The Finnish population is around 5.2 million; the population of Sweden is 9.2 million and that of Norway approximately 4.8 million. This means that the share of foreign-born population is by far the smallest in Finland (according to the latest data grown to 5%), and the highest in Sweden (over 17%); in Norway the share is over 8%.

Nordic countries have very different shares of immigrants in the whole population; nevertheless, it is to be expected that in the future the direction is towards some convergence; for instance, the pace of growth in immigration in Finland is now comparable to or higher than that in other Nordic countries, and in particular the number of refugees and asylum-seekers has risen during the past few years in Finland. Also, the development of immigrant policies points towards some convergence in the future.

In Sweden and Norway the interest in immigration and immigration policy is very long-standing, partly since immigration has been an important means to increase labour supply. There has also been a standard practice to implement living conditions surveys of various types on immigrant population (e.g. Tema invandrare 1991; Social och ekonomisk förankring 1999 & Olika villkor - olika hälsa 2000; Blom 1998; for Denmark, cf. e.g. Mikkelsen 2001). In Sweden the Central Bureau of Statistics SCB publishes a great deal of statistics and research on its web-page [www.scb.se](http://www.scb.se), similarly to the migration administration Migrationsverket ([www.migrationsverket.se](http://www.migrationsverket.se)).

[migrationsverket.se](http://migrationsverket.se)). Another key administrative organ was Integrationsverket (integration administration), closed for administrative reorganization: it has produced a high number of interesting research and statistics during its existence (available now on [www.mkc.botkyrka.se](http://www.mkc.botkyrka.se)).

One of the key research institutes in migration studies in Sweden is the Centre for Research in International Migration CEIFO with the University of Stockholm ([www.ceifo.su.se](http://www.ceifo.su.se)), and another one is Stockholm University Linnaeus Center for Integration Studies ([www.su.se/sulcis](http://www.su.se/sulcis)). There is also the Immigrant Institutet, with less emphasis on research and more on documentation and information dissemination ([www.immi.se](http://www.immi.se)). Additionally, there is, among other things, a long-standing tradition in research on discrimination and racism by Integrationsverket (with a number of barometers published) and academically by Anders Lange et al. (e.g. 1995; 1996; 1997 & 1999). At Karolinska Institutet a great number of dissertations focusing on immigrant health have been produced (many listed in Mannila 2008; Gadd 2006; Hjern & al. 2001; Klinthäll 2007; Bask 2005; Österberg & Gustafsson 2006; from Norway e.g. Syed & al. 2006).

In Norway, some of the key research centres in the field include International Migration and Ethnic Relations Research Unit at the University of Bergen (<http://imer.uib.no>), a key player in the Nordic IMER immigration research network, as well as FAFO ([www.fafo.no](http://www.fafo.no)) with a long-standing interest in neighbouring countries (incl. the Baltic States and Russian Federation) and, increasingly, on immigration, immigrants in the labour market and their social protection. A special focus of FAFO has lately been on Polish immigrants in Norway, their labour market status and living conditions.

These are merely some key information sources in Swedish and Norwegian immigration research - in some form or at some level immigration is a topic of interest in all Nordic universities, and in all countries there are also administrative reports giving useful information on immigrants' life and policies designed for them nationally and locally. Worth mentioning is also the Nordic Migration Research network maintained by the University of Copenhagen and bringing together some researchers and projects from all Nordic countries (<http://nordicmigration.saxo.ku.dk>). In the Network of Excellence Reassessing the Nordic Welfare State, funded by all Nordic Academies of Science ([www.reassess.no](http://www.reassess.no)) there is also a research strand on immigration.

## Immigrants and their social situation in Finland, Sweden and Norway

### Ethnic background of immigrants

In Finland the largest group of immigrants by the country of origin consisted in 2004 of people born in Russia or in the Soviet Union (26%), and the second largest group of those born in Sweden (18%). To a very large extent these two groups contain persons of Finnish origin, either from the Finnish minority in Russia or returning Finnish emigrants to Sweden in the 1960s or 1970s plus their children (see more in detail later in this article). The next ethnic groups by the country of origin were Estonians (7%), countries that were part of the former Yugoslavia (3%), Somalia (3%), Iraq (3%) and Germany (3%).

By language, we get a somewhat different picture: after Russian-speakers and Estonians there is a considerable minority speaking Albanian (mainly from Kosovo) or Arabic (from a number of Arabic-speaking countries from Morocco to Iraq). Besides Russian-speakers and those coming from Sweden, also a high share of persons coming from Estonia have been of Finnish origin. Presently, the share of Estonians is growing very fast in Finland, and there is also a large number of those who commute to work in Finland having the basic domicile in Estonia: the size of this group is not known but it is estimated to be tens of thousands. The profile of immigrants to Finland during 1994-2006 has been rather stable: the three most common countries of origin have been Sweden, Estonia and Russia. The relatively large Somali, Kosovan, and Iraqi minorities reflect the national policy focusing on refugees or asylum-seekers (Heikkilä & Pikkarainen 2008).

In Sweden by far the largest minority consists of Finns, who belong to two groups: approximately 50,000 persons who belong to the traditional Finnish minority in Northern Sweden and are not immigrants, and 450,000 persons, who emigrated from Finland mainly in the 1960s and 1970 (including the second generation). Other major minorities consist of persons born in the countries of the previous Yugoslavia and many other groups, for instance, Assyrians or Syrians (approximately 100,000). Presently, there is a major gender difference in immigration to Sweden: for men, the most common countries of origin are Iraq, Turkey, USA, United Kingdom and Poland, for women Iraq, Thailand, Poland, China and Russia. The largest group of those who came as refugees or asylum-seekers consists of people from Iraq (35%), followed by persons from the countries of the former Yugoslavia (Kosovo, Bosnia-Herzegovina), Somalia, Iran and Afghanistan.

We see that the profile of Swedish immigrants is characterized by labour immigration previously from Finland and nowadays e.g. from Poland and the Baltic States - and a humanitarian emphasis as reflected in the very high figures of refugees and asylum-seekers (e.g. *Invandrare i Sverige* 2009). The latter is even

more true for Norway, where the largest groups have come from Pakistan (28,000), Sweden, Iraq, Somalia, Denmark, Poland, Vietnam, Bosnia-Herzegovina, Iran and Turkey (Malmberg 2008; Blom 2008a). In Norway, the immigrants' ethnic profile is more multi-faceted than in Finland (dominated by ethnic Finns and Russian-speakers) or in Sweden (dominated by Finns); it has consisted largely of refugees or asylum-seekers plus persons from other Nordic countries who often may have come for work or as a result of marriages. Nevertheless, the Norwegian high salary and wage levels increasingly attract today labour immigrants from the new - and some old - EU Member States (e.g. Poland).

Besides labour immigration and humanitarian policies towards refugees and asylum-seekers, the third very important reason for immigration to the Nordic countries is intermarriage. We can see this very clearly among Russian-speaking immigrants to Finland (Liebkind & al. 2004), and the importance of certain countries among the countries of origin of immigrants also reflects this: e.g. Thai and Russian women coming to Sweden. According to Finnish research intermarriages contribute to good integration (Jääskeläinen 2003); but this must be contrasted with the vulnerability of immigrant families (see below) – this vulnerability may, however, relate both to intra- as well as intermarriages. At present there is also a discourse in Nordic countries concerning immigrants' role in 'opening doors' to new immigrants (e.g. children first, then their parents; men first, then their families). According to recent Swedish research, altogether 16% of immigration to Sweden could be explained by this phenomenon, i.e. by the immigration that has taken place earlier (Anhöriginvandrare och deras familjer 2008).

Some comments on two traditional ethnic minorities in Finland, Sweden and Norway. The Sami people are the only indigenous people living in all three countries (plus Russia): they speak a Finno-Ugric language (with some dialects) but the largest number of Sami lives in Norway (60,000–100,000, depending on the definition). Altogether there are fewer than 140,000 Sami, with 15,000–25,000 in Sweden, 6,000–10,000 in Finland and 2,000 in Russia. Another traditional ethnic minority consists of Roma with approximately 40,000 in Sweden, 10,000 in Finland and 500 in Norway. Similarly to Sami, the Roma group is internally heterogeneous, in particular in Sweden, consisting of immigrants from very many countries. The Sami and Roma languages have obtained the official status of a minority or regional language in all three countries; the same goes recently for Finnish in Sweden, while Swedish is one of the two national languages in Finland.

The status of the Sami and the Roma is fairly stable in Nordic countries, and it is to be feared that the Roma and the Sami, to a certain extent, are presently neglected in the discourse on immigrants and ethnic minorities, which focuses on new issues that are seen more challenging (e.g. the role of Islam).

## Immigrants, labour market status and subsistence

In Finland, a larger share of immigrants than that of the native population is of the standard working age between 15–64 years (79% vs. 66%). However, only 60% of the immigrants belong to the labour force, as contrasted to 75% of the basic population. In particular, labour market participation is lower than that of the native population and also lower among women (55%) than among men, due to cultural traditions of some immigrant groups.

A key characteristic of Finnish immigrants' life is a marginal labour market status including higher risk of unemployment. According to statistical data, we could state that the unemployment rate of immigrants varies by economic cycles in parallel to that of the general demand for labour but in general it has been manifold as compared to that of the native population. The general unemployment rate for Finland was 7% in 2008, but for immigrants the rate was around 20%, with considerable variation by ethnic group. EU citizens and people from other 'Western' countries, like the USA and Australia, manage just as well as the basic population, followed by the Estonians and Russians or other Eastern European immigrants; those immigrants who came to Finland as asylum seekers or refugees manage much worse (in particular, those from Afghanistan, Iraq, Iran, Somalia, Sudan, according to the Finnish Government Report... 2008). These differences may be related to cultural factors, education, health status and life course (e.g. Mannila 2008) as well as to discrimination (Jasinskaja-Lahti & al. 2003).

In Sweden we see very much a similar phenomenon to that in Finland. While the share of persons in the labour force for those born in Sweden is close to 80%, the share of those of Nordic (usually Finnish) origin is already more than 10% lower. The lowest shares are among African- and Asian-born immigrants, somewhat over 40% (Integration 2008), and as far as the gender difference is concerned, we see a similar profile to that in Finland. Swedish data also show that for immigrant women, in particular for those from African, Asian, South American and non-EU-European countries it is more difficult than for the native population to turn the education into occupational success. Altogether, the shares of workforce for foreign-born men were 12% and for women 18% less than for native-borns in Sweden (Statistikrapport 2007; Integration 2008).

For Norway, we see that the share of persons in workforce among Sri Lankan immigrant men is as high as or higher than among the native population. Among female immigrants, only Bosnia-Herzegovinian women matched Sri Lankan women in this respect. The ethnic groups with the lowest employment rate in Norway are Somali, Iraqi, Iranian and Pakistani (Mathisen 2008) – i.e. some of the largest immigrant groups in Norway. Thus, on average, immigrants in Norway seem to have a different, more vulnerable, profile than immigrants in Finland or Sweden since until lately the share of labour immigrants has been less in Norway.

Liebkind & al (2004) found for Finland that immigration usually meant going down occupationally: among Estonians, Russian-speakers, and ethnic Finns, only Estonians were mainly able to maintain their previous occupational level. We find similar recent results in Sweden for immigrants of Nordic origin, who constitute the only group of immigrants who maintain pre-immigration occupational status. This may partly be explained by the “salmon” hypothesis: unsuccessful migrants tend to return to the country of origin, which is very easy between Nordic countries and Estonia that is, it may not be so easy for these groups either, but we do not find the unsuccessful immigrants since they have returned. For Norway, the results show a mismatch between immigrants’ education and occupation level with an occupational trajectory going down (Mathisen 2008).

In general, immigrants’ education as well as their qualification in general are very difficult to measure in a way comparable to that of the native population, and usually comprehensive ethnic samples consist of persons who have acquired the education and training in the country of origin as well as of persons who have received their education and training in the target country – but these groups may be received in a completely different way in the labour market. The key Norwegian report points out the inadequacy of the national official register data and a need to carry out survey research: in reality the education is often higher than what the registers show (Henriksen 2008).

Looking at education levels we see a rather direct link to successful employment. Thus, 38% of Russian-speakers and 21% of Estonians in Finland have an upper high-level education, while the corresponding share among Somali is only 10% and among the Vietnamese 8%. The figure for the whole population in 2001 was 32%. Altogether, 27% of Somali and 34% of Vietnamese immigrants, but only 2% of Russian-speakers, lacked basic education (Pohjanpää & al. 2003); we have similar information concerning Vietnamese immigrants to Norway (25%; Henriksen 2008).

A similar differentiation is found also in Sweden, with Nordic immigrants more or less at the Swedish level, and Asian, African and non-EU European immigrants at the bottom of the scale (Integration 2008). Norway shows a somewhat different pattern, with over 40% of Iranian immigrants having higher education; also Chilean and Iraqi immigrants often have very high education. The results are largely explained by the high share of persons in these groups who came to Norway at a very young age. This, however, indicates that there is a variation among groups of refugees and asylum-seekers, among whom there are some groups with a very large share of intelligentsia and other groups with a large share of persons lacking basic education. The high education does not always turn into labour market success, at least not for men and women alike.

The ratio of unemployment rates between the foreign-born and native-born population by OECD data (2007) is almost the same in Finland and Norway and only slightly less in Sweden (Johansson 2008). In spite of the differences in the

composition of the immigrant population in the three countries, the vulnerability to unemployment is by the OECD data twice as high for immigrants as for the native-born population in all three countries. We may hypothesize that the unemployment rate of immigrants in Finland is higher than that in Sweden or Norway due to the rather small share of labour immigrants to Finland. This potential influence is probably counterweighed on the aggregate level by much larger numbers of refugees and ex-asylum seekers in Sweden and Norway, amounting to higher levels of labour market vulnerability and poverty. The large share of ethnic Finns coming from Sweden or Russia among immigrants to Finland means, in practice, that these persons are also, in fact, labour immigrants in the case they are not retired, although their official motive of immigrating is ethnic.

A key characteristic of immigrants' employment seems also to be that employment does not always buffer against poverty. For instance, in a study on Russian-speaking, ethnically Finnish and Estonian immigrants to Finland, self-assessed poverty was more typical of the immigrants than long-term unemployment (Liebkind & al. 2004). Norwegian data show that in 2005/06 altogether 11% of immigrants – as compared to 5% of the whole population – often had a problem of meeting basic needs such as paying for food, transport or accommodation, but there is, again, considerable variation by ethnic groups: the subsistence problems were most common among Iraqi and Somali immigrants and least common among the Vietnamese and Bosnia-Herzegovinian immigrants.

The poverty is related to the fact that finding employment in the new country often means low-pay jobs and downgrading professionally, which, again, may have several reasons. The skills “baggage” acquired in the country of origin is not well recognized, and measuring skills as it happens now may not be adequate to assess the real contents of the “baggage”. There is also evidence for discrimination in employment from all three Nordic countries (e.g. Jasinskaja-Lahti & al. 2003; cf. Lange 1999; Tronstad 2008; *Integration och etnisk diskriminering i arbetslivet* 2006). In Norway the ethnic group facing strongest discrimination in the labour market is Pakistani immigrants; Somali immigrants both in Norway and in Finland also often experience labour market discrimination (Jasinskaja-Lahti & al. 2003; see also the MEDIS research of the Fundamental Rights Agency). Nevertheless, there are exceptions to the rule: Norway-born children of Vietnamese immigrants who received inadequate education experienced little differential treatment at job centres, and they also fared relatively well in the labour market according to the abovementioned sources. The labour market outcomes of immigrants are caused by a complex set of factors such as education, culture and discrimination and their impact varies by e.g. host country and ethnic group.

The registered earnings of Finnish immigrants have been so low (Forsander 2002) that supplementary income must be somehow available. There are two major ways to find this supplement, and they are not mutually exclusive. On the one hand, supplementary income or other resources can be earned in informal employment

or barter relations which may take place also inside the family or network of relatives, on the other hand, some families may rely on the social benefits such as child benefits, housing benefits etc. A great deal of formally unpaid work is done by women, and family networks are important for finding any work – as an extension of this thinking we must bear in mind the importance of ethnic market niches in all European countries. For Finland, Sweden and Norway, information concerning informal employment is surprisingly scarce and mostly based on estimations (e.g. Baldwin-Edwards & Kraler 2009).

Information about immigrants' use of services in Finland points to a higher-than-average use of child care and child benefits, due to a higher number of children, while the elderly care is underutilized since most immigrants are not old enough; this underutilization may also be due to cultural reasons (Gissler & al. 2005). Evidence shows that immigrants' chances to find work in the Finnish open competitive labour market are shockingly low, the services of job centres do not seem to open any new chances, and in this case ethnic networks offer a way out (Akhlaq 2005).

## Family vulnerability, geographical segregation and health

Immigrant families show a rather high degree of vulnerability in Finland in the sense that 21% of immigrants to Finland during 1991–2004 lived in single parent families. The share was particularly high among those coming from Somalia, Uzbekistan, Vietnam and some African countries, which may be related to the refugee or asylum-seeker background and in some cases the situation may be temporary. The share of immigrant clients in family shelters in Greater Helsinki Area is also very high: it has increased from 9% at the beginning of the 1990s to 30%. Rather than improved accessibility to shelters, this indicates a dysfunctional family life and would deserve more attention. A similar share of single parent immigrant families is in Norway (Blom 2008b). Violence in immigrant families has been a major focus of attention in Sweden and Norway due to reported cases and discourse on murders related to 'family honour'. In Finland this discourse has been less significant and more of a theoretical character.

Here we may point out also that the statistics show a disadvantage of immigrant youth as compared to the native youth. For instance, approximately 50% of Finnish-speakers and 59% of Swedish-speakers of the 1980 cohort started college studies until 2005, while the share of those speaking other languages was only 23%. The corresponding shares in Sweden were for Sweden-born population 45% and for foreign-born population 35%; for those born in Sweden with foreign-born parents the share was 37% (Integration 2008); both education outcomes and the labour market status after accomplished education are somewhat better for native than for foreign-born population (Statistikrapport 2007). Nevertheless, we must remember

the very high variation between ethnic groups. The risk of dropping out of school at all levels is in Finland higher among immigrants than in the native population. However, on average Finnish immigrants do considerably better in education than those of other OECD countries (Finnish Government Report... 2008).

As far as geographical segregation is concerned, Finland shows a rather low degree of segregation by ethnic origin. Concerning spatial development of urban areas, there are studies by Vaattovaara & Kortteinen (e.g. 2003) indicating that there are no slums in Finland, largely thanks to very successful housing policy which attempts to mix various types of housing. As far as geographical distribution of immigrants across the country is concerned, approximately 50% of immigrants concentrate in a rather narrow strip of Southern Finland, and approximately 75% live south of the Turku-Tampere-Lappeenranta line (Heikkilä & Pikkarainen 2008). The attempts to place refugees and asylum-seekers all over the country in order to balance the financial burden of local governments has not been very successful: people tend to move from northern and eastern parts of the country to the south, which is the common tendency also among the native population. However, the key immigrant groups in Finland, ethnic Finns and Russian-speakers are not very strongly concentrated in any part of the country (e.g. Liebkind & al. 2004).

In the 2000s there has been a stronger concentration of immigrants in urban centres as well as in the south - this corresponds to the general tendency in Finland (Heikkilä & Pikkarainen 2008). The concentration of immigrants is rather strong also in Sweden, in spite of the high share of immigrants in the whole population. In particular, immigrants from Africa (46%), South America (47%), North America & Oceania (38%) and Asia (33%) are concentrated in Stockholm province. Interestingly, the two other key provinces in Sweden, Västra Götaland (with Göteborg) and Skåne (with Malmö), do not seem to attract immigrants coming from outside Europe (Integration – en beskrivning av läget i Sverige 2008; Invandrades flyttmönster 2008; cf. this with widely reported problems between immigrants and native population in some parts of Malmö).

The geographic and urban concentration of immigrants in Norway is of a similar type to in Sweden: approximately 25 % of all Oslo inhabitants i.e. 131,000 persons were of immigrant background (Daugstad 2007). Some 20% of all inhabitants in Oslo are of non-Western background, and in Oslo there is a strong differentiation between suburbs and other parts of the city, the share of immigrants varying from 11% to 43% by urban districts. Similar differences can also be found in Sweden (e.g. the famous immigrant centre Rinkeby near Stockholm, sometimes shown also as a positive example of local immigrant policy).

A key indicator of social disadvantage may be life expectancy, and here we find a wide differentiation among immigrant groups. The key factor influencing health status is ethnic background, with persons immigrating as refugees or asylum-seekers having a very strong burden in their life experience, be it in the country

of origin or in a refugee camp, and most often coming also from countries with a relatively low life expectancy.

Labour immigrants tend to be in relatively good health, at least compared to their compatriots who do not emigrate. For instance, the good health of the Canadian and Australian populations is partly attributed to the good health of immigrants. Research findings show that the “healthy migrant” hypothesis is valid for Estonian and Russian male immigrants in Finland; “salmon hypothesis” may also hold good as stated earlier for Estonians (Liebkind & al. 2004); other Finnish research points in the same direction (Pohjanpää & al. 2003). The refugees and asylum seekers, and labour immigrants are the two extremes in health, between which the health of other types of immigrants may be placed: e.g. those who get married, those who come for family reunification or those whose arrival has been the result of an ethnic policy.

Living conditions of immigrants, such as occupational risks, the life style that is the outcome of the interaction of the old-country “baggage” and new social environment, and acculturation stress also bear an impact on the morbidity and mortality of immigrants. There is also a wide variation by types of ill-health and causes of mortality, although international results show that, with time passing, the profiles of immigrants tend to become closer to those of the native population for good and bad.

Swedish results show that women from Iran, Iraq and India live 10-15 year longer than the compatriots who did not emigrate; for Russian men, the difference in life expectancy was 17 year in the advantage of those, who immigrated to Sweden. Results from Norway (Östby 2002) showed that children born to two immigrant parents had higher mortality than their parents. In conclusion, immigrant health is a complex issue with a number of constituting and potentially contradictory factors which must be studied.

## Attitudes and discrimination

There is evidence that citizen’s attitudes towards immigrants fluctuate by economic ups and downs: during a recession the attitude is more negative, and the attitudes towards various ethnic groups clearly show the impact of labour market considerations: according to a recent study on the booming year of 2007, Finnish attitudes were more positive than ever during the decades of 1987–2007 (Jaakkola 2009). Finnish attitudes were most critical against Somali immigrants, and this is also reflected in the research findings concerning discrimination in Finland (Jasinskaja-Lahti & al. 2003; MEDIS 2009). Jaakkola explains her results on the basis of a conflict theory stating that increased contacts – of any character, at work, in the street, when travelling – between population groups reduce prejudice; this result is also linked with immigrants’ language skills that increase a possibility

of communication, and they can be supported by adequate policies. The hostile attitudes tend to concentrate among those with less education; thus, education supporting diversity and transnational understanding will be productive (see also *Integration och etnisk diskriminering i arbetslivet* 2006).

There is a strong link between attitudes, discrimination and racism, although these phenomena are conceptually far from being simple and they are difficult to measure. A report from Sweden (*Integrationsbarometer* 2007) shows that racism and xenophobia are increasing, although they are very uncommon, and the overwhelming majority sees Sweden as a non-racist society. So far, we have only addressed labour market discrimination; however, various forms of discrimination are interrelated and they must be studied together: e.g. discrimination of children at school most certainly has consequences for the whole family with an inter-generational impact.

## National backgrounds of immigration policy – the case of Finland

In this section, we focus on the Finnish immigration policy solely with no references to Sweden or Norway. As we have seen above, there are important differences – in particular in the share and constitution of immigrant population – between Finland, Sweden and Norway. The historical differences are partly produced by immigration policy and they also bear an impact on the immigration policy of today and tomorrow.

### Background and change

Finland has a long-standing tradition of emigration, and there is an estimate that approximately 1 million persons with Finnish roots live abroad, mainly in Sweden, Canada and the USA. This bears still an influence on Finnish attitudes towards emigration vs. immigration: it is easier to imagine Finns living in distant countries and “making it” than to imagine immigrants settling and making a living in Finland. Another factor bearing an impact on Finnish immigration policy is the fact that there have always been Finnish minorities living outside the Finnish national borders. Besides the Finnish minority in Northern Sweden, and there has always been a large number of Finns living in the Republic of Karelia in the Russian Federation, as well as around Saint Petersburg; in Norway the traditional Finnish minority is limited to some municipalities in Northern Norway, called Finnmarken in Norwegian. There has been a strong sentiment in Finland that Finns must offer ethnic Finns a home country, which has amounted to certain ethnocentrism in immigration policy. This approach, still legislatively valid although weaker today,

has been supported by the fact that, in the course of history, Finns living outside Finland have been repressed to various degrees.

Due to this ethnocentric approach in the Finnish immigration policy and established by legislation in the 1980s, there has been an inflow of Finns from the Russian Federation and Estonia to Finland which has continued, with some fluctuations, until today (e.g. Liebkind & al. 2004). This has amounted to a group of approximately 30,000 ethnic Finns moving to Finland, and there is a queue of several thousand families at the Finnish consulate in Saint Petersburg still waiting for the permission to come. The interest of Finns living in Estonia in moving to Finland was strongly reduced in the course of 1990s, and since Estonia became a Member State of the European Union, population movements between Estonia and Finland changed the character. Due to this approach, mixed composition of families and some historical factors, there are now approximately 50,000 Russian speakers in Finland; if we classify immigrants by language this is presently the largest minority group in Finland, followed by Estonians who number around 15,000 (excluding those who only commute between two countries).

Counting by citizenship, Swedish citizens are the second largest group of foreigners in Finland amounting to almost 30 000 persons: many of these persons are also of Finnish origin (Korkiasaari & Söderling 2007). The Finnish ethnocentric immigration policy has similarities to that in Germany (“Aussiedler” from Eastern Europe and the Russian Federation), Greece (“Pontic Greeks” from the Black Sea Region), Israel (defined as the home country for Jews from various parts of the world) and also Hungary giving special entitlements on the basis of historical reasons to certain groups considered “us” (cf. Dietz 2000; Halkos & Salamouris 2003; Haberfeld & al. 2000).

Another key strand of the Finnish immigration policy has been the focus on refugees and asylum seekers. Finland is one of few countries officially receiving people belonging to these two groups, and its asylum policy is comparable to that of Sweden or Norway. The Finnish quotas have, however, been much smaller than in other Scandinavian countries. In the course of the past 20 years, some of the major immigrant groups in Finland have come into existence as a result of this policy: Albanian-speakers from Kosovo and Bosnia-Herzegovina, Kurds from various countries (mainly Iraq and Turkey), Somalis, and Vietnamese are some of the best-known ethnic minorities in Finland: their size is small, but they have attracted a great deal of attention in the Finnish discourse.

A third key factor bearing a strong impact on immigration to Finland is related to family ties: surprisingly high numbers of – in particular female – immigrants in Finland have come to the country as a result of a marriage or family reunification (e.g. Liebkind & al. 2004; Heikkilä & Pikkarainen 2008; Jääskeläinen 2003). The prominence of intermarriages and people with Finnish ethnic origin among immigrants give a very special profile to Finland as a country of immigration. Finland is considered still by many a very homogeneous country.

In Finland, labour immigration has not been a topic of interest until recently: this means that the issue of work vs. welfare has been a potential problem to the vast majority of Finnish immigrants, since they have not come directly to work. Presently, immigration is increasing rapidly in Finland, and the small share of immigrants in Finland is growing fast. In 2007 almost 17,000 foreign citizens i.e. 22% more than in 2006, moved to Finland, and applications for a work permit since 2006 grew by 21%. This may be contrasted to the fact that in Finland in 2007 there were only 132,708 foreign citizens; counting by the country of origin the figure was higher 202 528, which points out that a very large share of immigrants become Finnish citizens as soon as possible: a similar trend exists also in Sweden and Norway. It is estimated that before the financial crisis there were approximately 90,000 foreigners working in Finland, out of this figure 40,000 persons work only temporarily (Finnish Government Report... 2008). A large share of these was, according to unofficial estimate, from Estonia and Poland.

Labour immigration is historically the least common form of population movements to Finland, although all migrants consider their perspectives in the labour market when making the decision on moving. For the first time, the Finnish Government Programme for Immigration (2006) lays a strong emphasis on labour immigration – besides refugee and asylum policies, which retain their previous significance, while the ethnocentric approach is phasing out. Also the new European Social Fund Programme for Finland 2009–2010 has a strand which aims at increasing the attractiveness of Finland for labour immigration, and there are tens of projects focusing on this goal during 2008–2010 (cf. also Finnish Ministry of the Interior 2008). The present government has continued to develop the immigration programme of 2006 further and has, for instance, composed an implementation programme (2008) for it. Due to the unification of the EU labour markets an increasing number of recruiting companies are operating in Finland. In this respect, the development in Finland is delayed as compared to that in other Nordic countries, which traditionally have been countries of labour immigration and presently are experiencing a certain backlash in their openness and introducing more restrictive immigration policies. In Finland, on the level of government programmes and projects, we see increased openness, although on the level of debates the situation in Finland may be rather similar to that in other Nordic countries.

There are several ethical considerations concerning population movements between countries, as reflected in the discussion whether international mobility is a zero-sum or a win-win game. Due to the aging of population and other social factors developed countries will in the future face a major demand of professional workforce. There are calculations that in 2050 the European Union needs 63 million immigrants for the present labour performance, if the employment rate of the population will stay as today (Münz 2008). This prognosis is valid also for Finland, the population of which is according to the official EU estimates one of

the most vulnerable to aging in the European Union in 2030, although after that the situation will improve (European Commission 2008).

## Administrative reorganization and what it may mean

A recent key reform in the Finnish immigration policy is related to the new division of labour between Finnish ministries as of 2008. In this reform, the Ministry of Labour and Ministry of Trade and Commerce were joined together to become the Ministry of Labour and Economy. Immigration policy and the related issues belonging to the (previous) Ministry of Labour were transferred to the Ministry of the Interior. The Ministry of the Interior had already previously been responsible for immigration policy namely border controls, visa, residence permits and related issues; such issues as e.g. various integration measures were earlier planned and administered by the Ministry of Labour, but now only one ministry is responsible for all immigration policy. However, it is clear that many practical aspects of immigration policy need cross-administrative cooperation.

The new reform is in compliance with the standard organization of immigration authorities in the EU Member States. In Finland, the immigration administration in the Ministry of the Interior is split into three main branches, one responsible for labour market policies for immigrants; another responsible for social integration policies and the third one responsible for issues related to refugees and asylum-seekers. The Foreigners' Office under the Ministry of Interior has also received a new profile, and its name has been changed into Finnish Immigration Service.

This reform indicates a major change in the Finnish and European immigration policy: population movements inside the European Union will in the future be classified as professional mobility in the intra-EU common labour market, and they will be addressed in the future more in the context of general labour and economic policy and individual mobility than in the context of immigration. Thus, immigration is increasingly seen as the inflow of non-EU/ EEA citizens from “the third countries” – a new term coined – and its regulation. For Finland, this may be a more considerable change than, for instance, for Norwegians, because of a very large share of Russian-speakers (and ethnic Finns from Russia), and it will in the long run also emphasize the policies for refugees and asylum-seekers in the context of any immigration policy. We already see this shift in the ongoing debates concerning immigration, not only in Finland.

## Integration and other relevant policies

Since 1997 there has been a comprehensive system of integration services in Finland targeted to immigrants and administered by employment authorities. This means, in practice, training including language skills, plus various employment schemes mainly based on wage-subsidies for the employer and supplemented by rehabilitation services as needed. Besides Finnish courses, this system does not, however, substantially differ from the services available to any hard-to-employ client of the employment services. The key idea is that for every immigrant client of employment services or social protection offices, an integration plan listing the measures needed for a successful integration will be made. The idea is that the jointly prepared plan is a commitment done by public administration as well as by the jobseeker.

There is no strong evidence for a hypothesis that the immigrants who came to Finland before this system of services for immigrants was set up would presently be worse off in Finnish society. This, rather than pointing to a weakness of the system of integration services in place since 1997, may indicate that there are different cohorts among immigrants, and the labour markets they face change also by economic cycles.

Additionally, Finnish local governments, responsible for administering education as well as social and health care must prepare an integration programme covering all immigrants in the municipality and report on its implementation. Nevertheless, these plans are of very variable character, since the local governments have a very high degree of autonomy and there are no sanctions if the plan does not exist. All major public and private employers are also by law required to prepare an equality plan to address ethnic groups; very often this plan is done in the context of making a similar plan to promote gender equality, which is historically a much better established policy focus in Finland.

These are some key administrative instruments which aim to promote the successful integration of immigrants. Ethnic issues are the key focus of Finnish equality policy, which legally stipulates that a mandatory equality plan should be made by Finnish public and private employers; for other groups at risk and usually addressed by equality policy (e.g. persons with disabilities, elderly people, sexual minorities, religious groups), equality planning is not mandatory. A reform of the national Equality Act is in progress, with at present unknown results. Ethnic issues are also a key focus of the Finnish Ombudsman of Minority Issues. Presently there is also ongoing work in order to widen the focus of equality planning as well as the ombudsman's work in compliance with the wider scope of the European equality policy: this new focus will introduce also other potential grounds of discrimination. This does not mean that the focus on ethnicity will go down; when focusing also on other and more traditional groups at risk this work may gain new impetus in society.

The first Government Report to the Parliament on the implementation of the Finnish comprehensive system of integration services was given in 2002 and discussed in Parliament in 2003. The second Government Report to the Parliament was given in 2008 (Finnish Government Report... 2008). The latter document emphasizes very adequately the fact that integration is a two-way process: the immigrants must adapt to the receiving society, and the society must adapt to the immigrants. This is well in compliance with the modern understanding of acculturation defining integration in this way as the optimal outcome of the acculturation process: if it is not a two-way process we should not speak of integration (Berry 1997; Liebkind 2001). In 2010 the system of integration services was reformed by new legislation. The idea was to streamline the services so that all immigrants would have similar rights, and the legislation introduces a uniform assessment scheme on the basis of which the services can be better tailored.

The Finnish Government Report (2008) to the Parliament indicated very interestingly that the key buffer against social exclusion of immigrants is housing and urban planning, which must prevent the concentration of social exclusion risks as well as the immigrant population in certain districts or regions. Finnish research from the 2000s shows that this policy, in practice mixing various types of housing in the same urban district, has succeeded well until now. However, regional and in particular urban planning must in the future find stronger instruments, potentially including a reform of local taxation, to fight the risk (Vaattovaara & Kortteinen 2003). Research shows in general good cost-effectiveness of the Finnish integration legislation for immigrants: inputs turn into outputs as expected according to the assessment model developed (Accenture 2007). This does not seem to be true to the same degree for all Nordic countries, although we must bear in mind that their historical context and the scale of the issue are different from what we have in Finland (Thompson 2006).

On the basis of the attitude research referred to above, we may conclude that the present financial crisis, which will probably last for several years, will make the introduction of labour immigration into practice in Finland much more difficult and, in general, worsen the mental climate immigrants in Finland will face. This means that it will take a longer time to implement the policy change taken place on the level of programmes and projects in Finnish practice, and the protagonists of the new policy will face similar debates that have been going on in other Nordic countries already for a while.

## Some debates

This chapter does not contain references and it is based on a rather subjective selection of topics addressed in Finnish politics at various levels, newspaper articles and television programmes. We review some key issues brought up today in Finland, but the very same issues are relevant also in other Nordic countries. Today, we see an opening of a European Union – wide labour market (incl. EEA countries such as Norway) and its repercussions in debates. This may be such a major step in many countries including Finland that it will bring previously almost unknown critical and xenophobic reactions to the fore.

For Sweden, labour immigration as such is not new: since the constitution of the common Nordic labour market and free movement of workers in the 1960s the country has benefitted from it. The boom of the Norwegian economy and labour market thanks to the oil and gas industry put Norway into a similar situation as Sweden already in the 1980s. This means that in these countries there should hardly be any need to discuss labour immigration as something new, as an opportunity or a threat – nevertheless, there are debates, based on the idea of “how large numbers of immigrants a country can adapt”. Labour immigration is new only in Finland, and there have lately been some lively debates on the topic in Finland, and we illustrate the present social climate by some of them.

There is extensive discourse concerning the mobility of health care professionals globally. There are several WHO publications relevant to the topic e.g. the World Health Report 2006, and, for instance, there is the WHO Code of practice on the international recruitment of health personnel approved internationally. The European Commission has prepared a Green Paper (2008) on the issue and the OECD Migration Outlook has a special chapter on the international mobility of health workforce (Dayton-Johnson & al. 2007; OECD 2008a; 2008b). The point here is, on the one hand, whether it will be just to attract health professionals from poorer countries facing similar or more serious deficit of health care staff; is this not just another example of promoting brain drain? (cf. Katseli & al. 2006); on the other hand, there is always some degree of professional mobility, why not utilize it? This is the background of an administrative debate: Finland supports the general WHO and EU policies, but certain reservations are brought to the fore both by the government as well as the trade unions.

At a practical level, the Finnish debate on the issue has largely concentrated on some projects to import nurses from the Philippines. A private sector project of this kind was started in 2008 and there has been a great deal of public debate on it: the newspaper Helsingin Sanomat published several articles – one, several pages long (20 Jan 2008) – a television programme was made on the topic and various opinions still come up occasionally. The debate and the interest in the issue has been quite disproportionate taking into account that the project brought fewer than 10 nurses; now there is another project of partly similar kind ongoing

in the public sector and it has brought over 20 nurses from the Philippines with less public debate. The public debates concerning the international recruitment in health care may have been caused by the status of public health care as a ideological cornerstone of the Nordic welfare model, as well as by the high interest in health care of Finland. At the same time, labour immigration from the Baltic States and some other new member States in the field of construction seems to have increased without generating a major public debate, which is very interesting since this might have a major impact on wages, trade unions as well as on the contracting system.

Secondly, a most interesting debate came to the fore when the Finnish legislation addressing foreigners' status was reformed in February 2009. The idea was to reform the legislation, in particular with respect to the status of refugees and asylum-seekers, their right to family reunification and conditions of their repatriation. The role of family reunification is widely discussed in all Nordic countries. Its significance depends on e.g. the share of refugees, asylum-seekers and their family composition as well as the share of intermarriages. Extensive debate was carried out on this topic, with an outburst of new hostility towards refugees and asylum-seekers; there have been television programmes addressing the topic, increased activity on the Internet, and harsh criticism against the Minister responsible for immigration. Many leading politicians have felt the need to comment on the situation, some of them in a rather evasive way. It seems that the amendments to the law were not well prepared by the Ministry of the Interior – they were too vague and allowed for too much discretion – and the proposed amendments were changed in the Parliament. As a result of the debate the Finnish legislation concerning family reunification has not been loosened and it is considered to comply with the European Union standards. The main points of discussion are the definition of family i.e. who is entitled to family reunification, and how the travel costs of family members coming to Finland for reunification will be paid. Nevertheless, President of Finland as well as Finnish national churches have supported immigrants' cases where grandmothers of Finnish foreign-born citizens have been refused the permit to stay.

In general the debates tend to highlight only some individual points of major reforms. An increasing hostility towards immigration seems to become to the fore for the first time in Finland. The technical reason for this is the higher number of asylum-seekers in Finland during 2008. The number of asylum-seekers peaked earlier in 2004 with 3861 applicants, and then decreased considerably until 2008 when it peaked again, with 4035 applicants. Since then, the numbers seem to remain at the – for Finland – higher level. Only a minority of asylum-seekers yearly get a either the asylum or otherwise any entitlement to stay in Finland, but the process with the applications can take years – this seems to be no different from that in many other countries – which has been criticised from many viewpoints. Refugees come to Finland in small yearly quotas, they are carefully selected and usually show a number of social exclusion risks (e.g. disability). Lately, the number

of refugees to Finland has been around 700 a year and there are proposals that it should be somewhat higher (e.g. 1 000). In total, Finland is lagging behind Sweden and Norway, but we also have a discourse concerning “how many immigrants the country can adapt” pointing out that the limit has been reached.

A great deal of debate in Finland takes place by a rather small group of activists who seem to get a great deal of public attention. The main forum is the Internet where, for instance, Finns who detest Somalis were invited to sign a hate list: over 10,000 persons signed the list with their names. There was also a hate list threatening to kill the Minister of Immigration, over 100 persons signed that list: there is an ongoing police investigation on the matter leading into prosecution. Until now, xenophobia has been absent in Finnish politics (unlike some other Nordic countries), but the last elections for local government point towards an increase of racist tendencies. In the latest elections a new party *Perussuomalaiset* (“Basic Finns”) gained 4 seats, out of 200 (2 %), and in particular some local supporters of this party are highly critical of the present immigration policy: the opinion polls show that the support of the party is growing and may well reach 15%, and there seem to be spin-offs of their populism to other political parties.

Similar debates and political approach are found in Norway with the *Fremskrittspartiet* (“Party of Progress”), which already has 38 representatives out of 169 (22%) in the Norwegian Parliament *Stortinget*. In Sweden *Sverigedemokraterna* (“Swedish Democrats”) just entered the Swedish Parliament with a considerable number of seats and, due to the lacking majority in the government, may well play a key role in the issues of their interest, even if no party does seem to have any open interest in cooperation with them; most of the racist and xenophobic activities in Sweden occur outside the political establishment. These include, for instance, riots in Southern Sweden, a recent scandal in the training of police force revealing racist tendencies, some crimes which have had obvious elements of hate and also various Internet activities.

In the Finnish discourse, the arguments in the debate on immigration are most interesting. In the – hopefully small – wave of xenophobia that has arisen now, few seem to oppose labour immigration openly, although there have traditionally been strong protectionist feelings in favour of domestic labour and against foreign competition, and campaigns to promote domestic products have been traditional in Finland. In the public discourse the blame seems to be on refugees and asylum-seekers, with two kinds of arguments. Firstly, it is not believed that these people are in real trouble, claiming a faster investigation procedure of “unfounded applications” (quoted by a parliamentary candidate of “Basic Finns”) i.e. person in question knows that the application is unfounded before investigating it. Secondly, when their situation is recognised, the argument is that their number is already too high for the adaptive capacity of Finnish society.

There is a strong irrational element in this ‘blaming-the-victim’ debate. First, low success of refugee groups in the Finnish labour market is partly due to

the system of asylum-seeking, which in practice has isolated these groups from Finnish everyday life, in particular from the labour market. In the second place, when refugees are being selected, there has been a special emphasis on identifying the most vulnerable people and families (e.g. persons with disabilities or people who suffered serious torture). It is obvious that these kinds of people need to go through a process of support and rehabilitation before labour market success can be expected. These background factors are, however, rarely brought up in the debates, and various groups of immigrants are often discussed simultaneously, without an understanding or a will to make distinctions badly needed for successful immigration policy.

Finally, allowing for a subjective view on the neighbouring countries, from a Finnish perspective, there are two interesting characteristics in the Swedish and Norwegian approaches to immigration, which are different from what we have in Finland. In Sweden, the stock data concerning the immigrants' country of origin seem of minor importance for statisticians and decision-makers, judging from the fact that breakdowns by that variable are not very common; flow data are much easier to find. This may reflect the integrative ideal of Sweden as a "folkhem" where all should be equal citizens independently of their background. In Norway, a distinction between European and non-European immigrants is often found in research, and rather often the European immigrants are excluded from the research focus. In practice this largely reflects the policy divide between persons from the "third countries", in particular refugees and asylum-seekers vs. others. As we found earlier, the share of refugees and (ex) asylum-seekers of all immigrants to Norway is high; the share of labour immigrants from EU countries is today not so small either, but labour immigrants are considered unproblematic.

## 4 IMMIGRATION IN SPAIN: DATA, DEBATES AND POLICIES

HANS-PETER VAN DEN BROEK

### Data on immigration

From the 1960s till the 1980s, Spain had been an emigration country, but halfway the 1990s the situation changed and immigration flows began to increase spectacularly. Today, Spain is considered to be the principal country of entry into the European Union. In 2003, the three Mediterranean countries Spain, Italy and Portugal received half of the net immigration into the EU-15 (CES 2004, 16), and in 2007, Spain and Italy alone received 69% of the migration inflows into the enlarged EU-27 (Laparra & Martínez 2008).

While in 1998, there were officially only 637,085 immigrants in Spain (1.6 % of the total population), in 2006 their numbers had increased to over 4 million, which amounted to 9.3% of the total population (Observatorio de Demografía y Mercado Laboral 2007, 2). By the end of 2008, immigrants in Spain numbered 5.2 million that is 11.3% of a total population of over 46 million inhabitants (Prieto 2009, see Table 1). This implies that, from 1998 to 2006, the population of foreign residents increased at an average rate of 26% every year (Observatorio DML 2007, 5). Only 20% of this growth can be accounted for by natural increase (i.e. births minus deaths), which means that the main part of the increase in the number of foreign citizens has been due to new arrivals (Izquierdo 2008, 619).

TABLE 1. Foreign population (citizens) in Spain

Year	Population	% total
1981	198,042	0.52
1986	241,971	0.63
1991	360,655	0.91
1996	542,314	1.37
1998	637,085	1.60
2000	923,879	2.28
2001	1,370,657	3.33
2002	1,977,946	3.73
2003	2,664,168	6.24
2004	3,034,326	7.02
2005	3,730,610	8.46
2006	4,144,166	9.27
2007	4,519,554	9.99
2008	5,220,600	11.30

(Source: [http://es.wikipedia.org/wiki/Inmigración\\_en\\_España](http://es.wikipedia.org/wiki/Inmigración_en_España).)

Figure 4.1 shows that not only have net immigration figures in Spain been higher than the average figures for the EU-15, but the gap between Spanish and EU figures has been growing incessantly for over a decade.

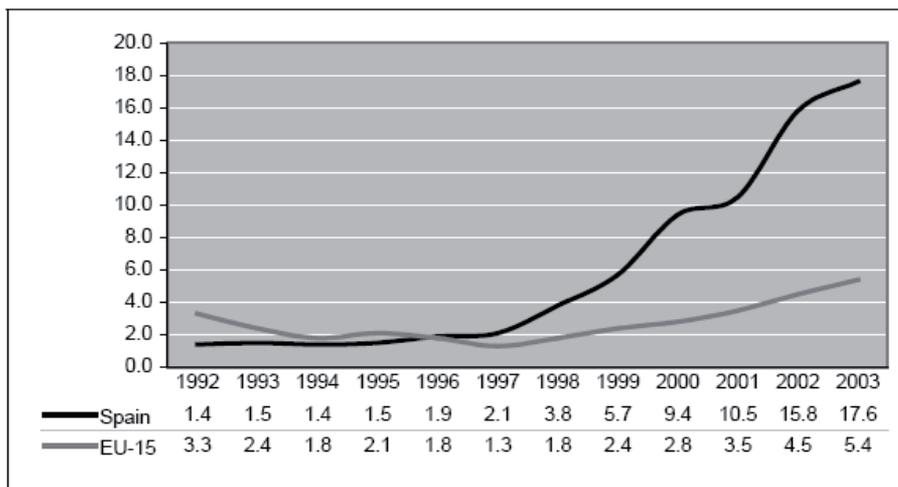


FIGURE 1. Net immigration into Spain and the European Union (per 1000 inhabitants) (Eurostat figures, by Serra 2005, 1.)

From the mid 1990s till 2000, immigration increased principally from Latin America, Africa, and non-EU countries. From 2000 to 2003, it was especially the influx of people from Central and South America that soared (CES 2004, 21), while the immigration from other European countries (especially Romania) has grown spectacularly since 2004. Table 2 shows the inflows of the main nationalities of immigrants between 1998 and 2007. The key countries of origin are Romania, Morocco, several South American countries, the neighbouring Portugal and also the United Kingdom. The UK immigrants to Spain are probably mainly retired people.

To understand the sudden changes in Table 2 of sometimes tens of thousands of new immigrants, one has to be aware of some key data. In 2000 and 2001, the Spanish Government regularized 160,000 and 230,000 illegal immigrants, respectively. In February 2005 the Spanish Government promulgated the most important regularization of the six ones that had been carried out since 1986: almost 600,000 irregular immigrants obtained a legal status. On 1 January 2007, the European Union incorporated Romania and Bulgaria as Member States, which not only implied a new influx of migrants from these countries, but also an automatic regularization of tens of thousands of Romanian and Bulgarian residents who had thus far been living in Spain illegally.

TABLE 2. Influx of immigrants to Spain per year, by country of origin in 2000-2007

	2000	2001	2002	2003	2004	2005	2006	2007
Romania	17,435	23,276	48,292	54,998	49,487	93,976	111,920	174,149
Morocco	38,178	39,256	39,930	40,865	58,839	69,288	60,830	71,397
Bolivia	3,318	4,835	10,562	18,119	35,339	38,349	69,467	46,055
United Kingdom	11,007	16,233	25,632	32,148	44,315	41,633	39,497	35,930
Colombia	45,868	71,014	34,042	10,888	16,610	20,541	27,864	35,690
Brasil	4,113	4,283	4,582	7,349	13,017	20,771	28,249	31,838
Bulgaria	6,493	11,761	15,842	13,648	17,898	15,453	17,664	26,889
Portugal	2,968	3,080	3,634	5,050	8,000	11,966	18,742	25,186
Ecuador	91,120	82,571	88,732	72,581	11,936	11,588	14,292	24,647

(Elaboration by the author, based on data from EVR – *Estadística de Variaciones Residenciales*, i.e. Statistics on Residential Variations; INE.)

After the 2005 regularization of illegal immigrants and the change of status of Romanians and Bulgarians in January 2007, the cohort of irregular immigrants decreased spectacularly. Izquierdo and León (2008) claim that, between 2003 and 2005, for every legal Romanian resident in Spain there were three illegal immigrants. In these years, about 50% of all foreign residents in Spain were believed to be illegal, while in 2007 their share was only one out of four immigrants (Izquierdo & León 2008, 29).

Different nationalities have gone through quite different immigration processes. The influx of immigrants from Ecuador was particularly high in the first years of the decade, but it has diminished in recent years, while the number of Romanian newcomers has been increasing year after year. The number of Moroccan immigrants has been high since the beginning of the century and at present this nationality constitutes the second-largest immigrant community, after the Romanians. The number of Bolivian immigrants began to grow when arrivals of Ecuadorians were declining.

Table 3 (next page) shows the total size of the main immigrant communities in Spain in 2008; the numbers only refer to registered immigrants.

What profile do immigrants in Spain have? 37% of them, some 1.5 million, had been living in Spain for more than 5 years and could thus be considered as settled, stable immigrant population (Izquierdo 2008, 627). According to the Active Population Survey, some 3.47 million immigrants came from non-EU countries. About 3 million immigrants were employed, 2 million of whom were non-EU citizens (Izquierdo 2008, 619). The gender distribution among immigrants varies widely, depending on their nationality. Figure 2 (next page) shows that among Latin-American migrants the number of women is generally higher than that of men. Among almost all other nationalities, male immigrants outnumber female newcomers (also CES 2004, 25).

TABLE 3. Nationalities with the highest numbers of registered immigrants in Spain in 2008

Nationality	Total	Men	Women
Romania	702,916	378,390	324,526
Morocco	575,242	372,577	202,665
Ecuador	414,188	203,313	210,875
United Kingdom	343,016	174,449	168,567
Colombia	279,064	123,717	155,347
Bolivia	235,507	103,314	132,193
Germany	173,247	87,464	85,783
Italy	150,358	89,250	61,108
Bulgaria	149,004	81,579	67,425
Argentina	144,905	72,689	72,216
Portugal	121,403	77,833	43,570
Perú	119,704	59,060	60,644
Brasil	114,519	45,978	68,541
China	111,984	62,196	49,788

(Municipal Census - INE, 'Padrón Municipal de Habitantes' 2008.)

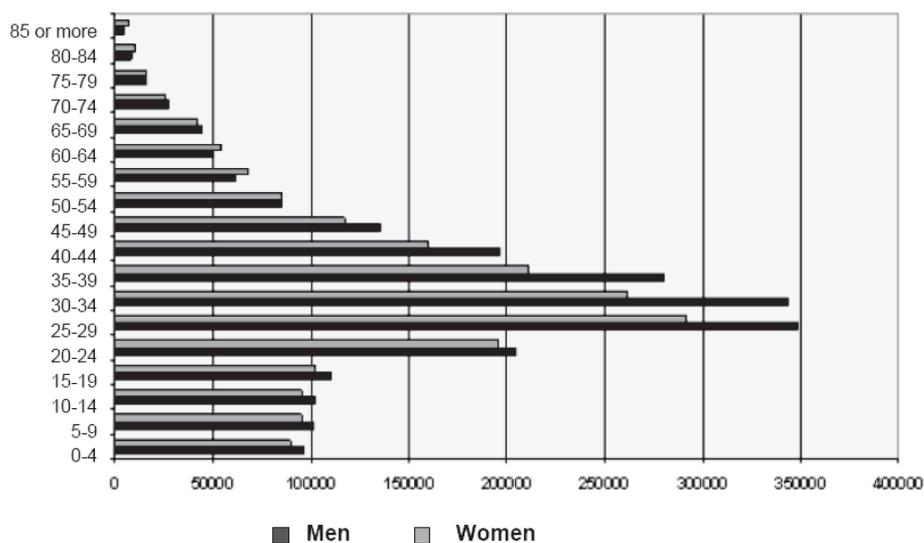


FIGURE 2. Number of registered foreigners according to age and sex (1 January 2006)

(Observatorio DML 2007, 6; INE.)

An indication of the fact that the foreign population in Spain consists mainly of labour immigrants is their youth: 51.4% of them are under 35 years (cf. 27% among Spanish nationals) and only 8% are older than 50 (35% for Spaniards) (Izquierdo 2008, 626). The population pyramid of registered foreigners in Spain (see Figure 2; also CES, 2004, 26) demonstrates the predominance of the age group 25-39 among immigrants, an image that contrasts with the relatively low percentage of young nationals in the same age-group.

However, we should not forget that a relatively large number of newcomers in Spain have not settled here for economic reasons, but because of the country's climate and its beaches. According to the *Observatory of Demography and Labour Market*, about 75% of foreign residents in 2006 (slightly over 3 millions) were labour migrants; the other 25% were *resident immigrants*, most of them pensioners from the UK, Germany and other European countries (Observatorio de Demografía y Mercado Laboral 2007, 5).

Most immigrants enter the country by plane (e.g. from Latin American countries) or by bus (from Central and Eastern Europe); nevertheless, the images that best illustrate the human tragedy behind much of the immigration are those of African migrants who land on the shores of the Canary Islands or Spain's Mediterranean coast in their rickety boats, often after having crossed the ocean for many days without any food or water. In the last 20 years, about 18,000 people have died while attempting to reach the Spanish shores. All in all, we should keep in mind that the inflow of sub-Saharan immigrants in the last few years has not exceeded 4% of the total immigration per year.

The principal reasons why immigrants prefer to come to Spain instead of entering the European Union through other member States are: (1) the country belongs to the European Union; (2) access is relatively easy (at least compared to other EU countries); (3) for immigrants coming from Africa, Spain is one of the nearest Southern access gates to the EU; (4) cultural or linguistic proximity (important for Latin-American immigrants as well as for Romanians); (5) internal control of immigrants is less effective than in other EU countries; (6) the informal economy absorbs or at least has absorbed 'irregular' immigrants without major obstacles (cf. CES 2004, 6; Izquierdo 2008, 620).

The dominant strategy of integration in the receiving society is through participation in the labour market in Spain, while alternative paths of integration, such as asylum or naturalization, are relatively much less common. Family reunification has become a major issue in recent years. The numbers of permits for family reunification increased from some 33,000 in 2003 to 128,000 in 2007 (Izquierdo 2008, 621) and in the coming years they will probably rise more. Altogether, more than 300,000 permits were issued in those four years.

Immigrants in Spain have not settled homogeneously across the national territory. As we observe in Figure 3, about two-thirds of the immigrant community concentrated in only 4 of the 17 autonomous communities in Spain: Catalonia,

the Community of Madrid, the Community Valencia and Andalusia, i.e. in those regions that by and large are characterized by a dynamic building sector, an extensive service sector (especially domestic service), or labour intensive agriculture.

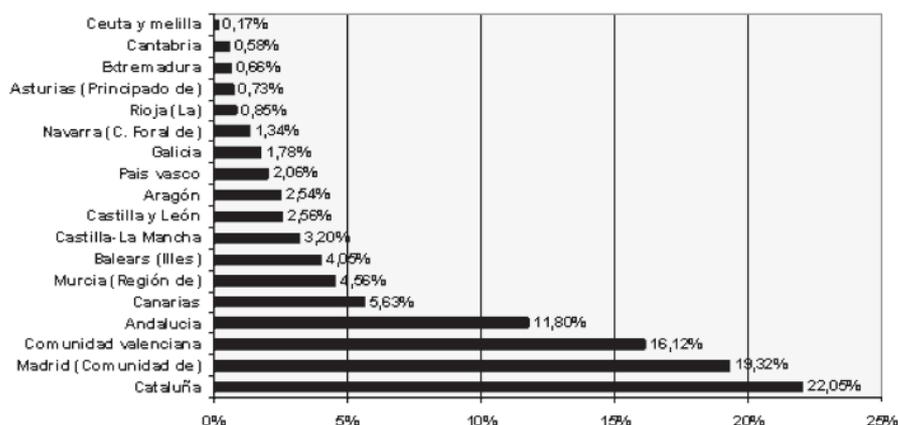


FIGURE 3. Number of registered foreigners by Autonomous Communities (1 January, 2006) (Observatorio DML 2006, 8; INE)

By studying the migration inflows into each of the 17 autonomous communities of Spain (plus the enclaves Ceuta and Melilla) in the course of the decade 1998–2007 we note that immigrants do not settle mainly in the richest communities or those with the highest economic growth and the best jobs. Rather, as Laparra and Martínez affirm (2008, 12–15), they move to those regions where it is easier to find irregular jobs or where there is demand for workers, who are willing to accept unstable, precarious, working conditions. A similar conclusion may also be derived from the fact that labour migrants are mainly found in the building sector, agriculture, domestic services, and bars and restaurants – sectors with relatively high percentages of irregular jobs. The authors claim that irregular immigration in Spain should not be understood as the result of failing border controls, but as a consequence of the irregular labour market. Thus, it is not so much the possibility of future regularization measures that constitutes a pull effect on potential immigrants, but rather the existence of a vast informal sector in the Spanish economy.

## Immigration and the Spanish labour market

The Spanish labour market, expected to absorb both native and immigrant workers alike, has the following characteristics:

- a relatively high unemployment rate, especially among women and youth;
- a high rate of temporary jobs and rotation between employment and joblessness;
- a relatively extensive informal sector of the economy;
- little growth of labour productivity, due to a high incidence of small enterprises with labour intensive activities;
- substantial regional differences by labour market indicators, together with low mobility among the active population.

From 1997 to 2008, the Spanish GNP grew at a rate of about 4% a year, almost 2% higher than the average growth in the Euro-zone. This economic growth fostered the creation of new jobs – jobs that could not be occupied by native workers alone. Thus, the favourable economic situation of the last decade boosted the demand for foreign labour power. The social characteristics of the national population that gave incentives to immigration are: the extremely low birth rate and the aging of the national labour force (i.e. in certain sectors – agriculture, building sector – there is lack of young, strong, workers), higher educational levels of the younger generations (thus, fewer young people are willing to do low-skilled jobs), and higher participation of women in the labour market (i.e. more and more families where both partners work outside hire – mainly female – immigrant workers to take care of the house, the children or elderly parents) (cf. Domingo & Houle, 2005).

Between 1995 and 2005, the active population in Spain increased by about 4.7 million people, 2.4 of whom (i.e. over 50%) were immigrants (Pimentel 2006). In 2007, the immigrant labour force occupied 16% of the total number of workforce in Spain (Manpower, 2008). As we see in Table 4, 66% of the registered foreign workforce (1.3 million) in 2007 consisted of immigrants from non-EU countries.

TABLE 4. Number of foreign workers registered with social security, by geographical area of origin, (end of) 2007

Continent / region	N	%
European Union	672,894	34
– Romania		12
Rest of Europe	69,754	3.5
Africa	360,785	18.2
– Morocco		13
America	744,432	37.6
– Ecuador		13
– Colombia		7
Asia	128,419	6.5
Oceania	776	0.04
Stateless / Unknown	4,046	0.2
Total	1,981,106	100

(Own elaboration, based on Izquierdo 2008, 639–640.)

As Pérez Infante observes (2007), despite the increasing participation in the workforce among Spanish women, the total rate for Spanish nationals is only 56%, far below the 77% corresponding rate among immigrants. The immigrants' participation in the workforce, which is especially high among Latin-American and non-EU, European immigrants – 85%, is due to the relatively young age of most immigrants and the fact that most of them came to Europe precisely with the aim to find work. According to Pérez Infante, this tendency is opposite to what occurs in most other developed 'immigration' countries, where the participation in the workforce in the basic population tends to be higher than among immigrants (cf. e.g. in Nordic countries).

Table 5 shows that, for the period 2003–2007, the participation in the workforce among immigrants was about 25% higher than that of Spanish citizens (Izquierdo 2008, 644). At the same time, as Izquierdo observes, the unemployment rate among immigrants was only slightly higher than among Spanish nationals, whereas in countries with a longer immigration history, unemployment rates among immigrants are often twice or three times as high as among natives.

TABLE 5. Activity, occupation and unemployment rates of immigrants and Spanish national population (2003–2007)

Rates	Immigrants	National Spanish
Participation in workforce	79.7	55.4
Employment rate	69.1	50.3
Unemployment rate	13.3	9.2

(Izquierdo 2008, 644.)

The Spanish Census data of 2001, i.e. still three years before ten new countries, mainly from Central and Eastern Europe, entered the European Union, reflect that the participation in the workforce for non-EU immigrants was much higher than among Spaniards; especially male and female immigrants from Eastern Europe and Africa, and also Latin-American and Asian women, had a rate 30–50% higher than Spanish citizens. Only the participation of Maghreb women in the workforce was lower than the corresponding percentage for Spanish females (CES 2004, 35; also Domingo & Houle 2005).

Spanish male and female workers had higher levels of labour market participation than immigrants from other EU15 countries. The unemployment rate in Spanish male workforce is lower than that among both EU and non-EU immigrant men. For national and immigrant women, the situation has been more complex: unemployment rates were lower for Asian, Latin American and Eastern European female immigrants than for Spanish women, but for African women they were much higher (26%).

Table 6 relates unemployment to gender and age, comparing immigrants and the native population.

TABLE 6. Gender and age of unemployed immigrants and national Spanish population (2003–2007)

	Immigrants	National Spanish
Sex		
– Man	47.4	43.4
– Woman	52.6	56.6
Age		
– 16–24	21.2	25.1
– 25–34	38.5	28.9
– 35–49	29.3	30.5
– Over 50	7.0	13.6

(Izquierdo 2008, 649.)

If we compare the distribution of immigrant workforce according to economic sectors with that of native one, we note that the participation of foreigners is especially high in the building sector, the service sector, bars and restaurants, and in agriculture (Izquierdo 2008, 647; cf. CES 2004, 51); Izquierdo refers to these sectors as the “four legs of low-productivity economy”. It is worth highlighting that among female immigrants, the overwhelming majority (96%) has found work in the service sector, especially in domestic service and home care of dependent (sick and elderly) people (Observatorio DML 2007, 11). According to the Spanish census of 2001, almost one of every two male immigrants worked in the building sector or in agriculture, 47%, against only 24% of native Spanish male workforce. Among female immigrants, 52 % worked either in the household or the restaurant sector (as against 11 % of native Spanish women by CES 2004, 52).

According to another study (Manpower 2008), however, it is incorrect to assume that immigrant workers have mainly occupied low-quality jobs, and the weight of low-quality jobs in the national economy has not grown significantly due to a higher influx of immigrants. The study claims that between 1995 and 2007, the number of qualified workforce grew by 3.3 million, against 1.3 million growth of the total number of non-qualified workers. Of these 1.3 million non-qualified workforce 1 million were immigrants, but 1.6 million immigrants belonged to the category of 3.3 million qualified workforce. The numbers of immigrants who entered the highest employment categories in these 12 years are relatively modest: they constitute about 0.2 million of the 2.6 million professionals and technicians, and some 80,000 of the almost 400,000 new managers. Other data, referring to the total numbers of immigrant and Spanish workers (2001), confirm also the under-representation of (non-Western) immigrants in the categories professionals or technicians and managers or self-employed. However, Asian citizens are represented in higher percentages in the latter category than native Spaniards and Western immigrants (cf. Domingo & Houle, 2005).

The latter study also suggests that, if immigrants tend to be overrepresented in some categories of workforce, this is because these categories are principal sectors

of entry' for many recently arrived immigrants: for men (excluding Asians), this is agriculture, and for women, domestic work. Izquierdo, on the other hand, states that the unequal distribution of immigrants along the occupational pyramid is an indication of their vulnerability and lack of integration (Izquierdo 2008, 647). The vulnerability is shown by the incidence of temporary jobs among immigrants, which is twice as high as among Spanish workers (Table 7; Izquierdo 2008, 648; also CES 2004, 54–59).

TABLE 7. Distribution of temporary contracts among wage-earning immigrants and nationals (2003–2007)

	Immigrants	Nationals
Indefinite contract	39.6 %	71.8 %
Temporary contract	60.4 %	29.2 %

(Izquierdo 2008, 648; based on INE, Encuesta de Población Activa.)

According to Izquierdo (2008, 650), the labour market for immigrants has become dualized: there is a top layer for immigrants who entered the country legally, and a bottom layer of irregular immigrants working in the informal economy. In this case, the author asserts, it would not be appropriate to speak of *segmentation*, considering that 'illegal' immigrants have the opportunity to ascend to the upper layer as a result of the regularization measures that have been implemented in recent years. However, we should note that a great number of 'irregular' immigrants do not fulfil the necessary conditions to become legalized; moreover, it is not clear whether new regularization measures will be taken in the near future.

It seems to be a fact that the irregular segment of the labour market is going through a process of feminization. Nevertheless, Izquierdo (2008, 653) suggests there are several factors which may temper or prevent the social exclusion of female immigrants. Firstly, many of them are from Latin-American origin, which implies they are fluent in Spanish and culturally close to Spanish society; secondly, they tend to have higher levels of education than male immigrants; and thirdly, many of them have their families in Spain, a factor that stabilizes their situation and motivates them to settle down permanently.

There are three main mechanisms for non-EU immigrants who attempt to get access to the Spanish labour market in a legal way: (1) through yearly contingents called 'contingentes', responding to the labour demands in different sectors of the economy, (2) following the a system of 'general regime' (*Régimen General*), whereby employers arrange temporary residence and work permits for their labourers, and (3) via regularization of workers who lack the necessary permits. Izquierdo (2008, 652) provides the following figure, which reflects the relative importance of these three paths (see Figure 4). We observe that a (small) majority of non-EU foreign workforce in Spain acquired legal status in the labour market as a result of

regularization, while only one out of eight responded to demands by the system of contingents. The explanation of the low effectiveness of the policy of contingents, forwarded by Arango & Sandell (2004), is that it is a slow, long-term process, with the public administration interfering directly in the labour contracts between the Spanish employer and its staff, something companies are normally only willing to accept if they have no alternatives.

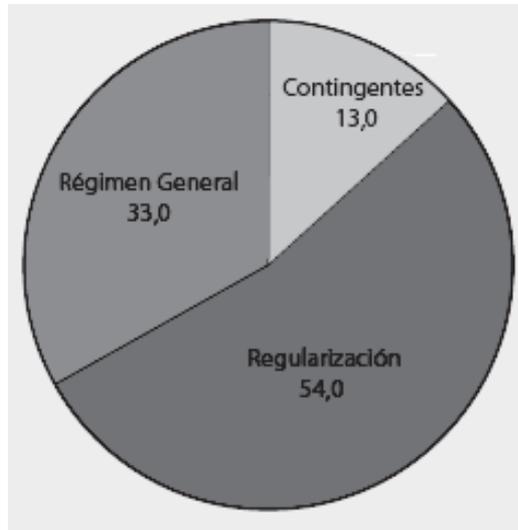


FIGURE 4. Legal mechanisms for immigrant workers to enter the Spanish labour market (2003–2006)

(Izquierdo 2008, 652.)

Arago & Sandell (2004) claim that a government which aims at curbing irregular immigration should not only – or even principally – focus on the immigrants, but rather on the logic behind the existence of an informal economy and the arguments employers use to explain why they ‘need’ to hire immigrant workers illegally. It implies, among other things, adopting a firmer stance in a more comprehensive fight against violation of labour laws.

### Labour market and educational levels – is the labour market segmented

While educational levels of the Spanish active population grew during the past 25 years considerably with almost 80% having a secondary education in 2005, against only 43% in 1987, more persons started to refuse low-quality jobs and move into jobs that offered them higher wages, better conditions and more stability

(cf. Castelló 2005). Figure 5 (next page) shows that the percentages of immigrant labourers with primary or secondary education are now higher than those of native workforce (although we should note that these percentages do not coincide with the figures provided by Castelló).

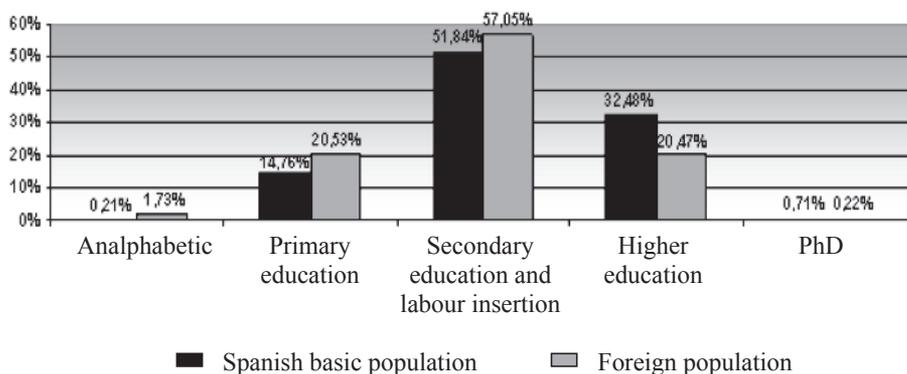


FIGURE 5. Education levels of workforce, national Spanish and foreign persons (2006)  
(Observatorio DML 2007, 9; INE.)

Moreover, Table 8 demonstrates that the average level of education among immigrants has increased in the last decade: percentages of those with no or only primary studies declined, while the proportion of immigrants with secondary education grew significantly; the percentage of immigrants with higher education was stable, but as the total number of immigrants in this period rose spectacularly, we may conclude that the number of immigrants with a higher education also has increased considerably.

TABLE 8. Evolution of educational levels of unemployed immigrants (1992–2007)

Educational level	2003–2007	1997–2001	1992–1996
No studies	10.0	14.6	16.6
Primary	21.3	21.6	27.0
Secondary	50.3	43.7	37.1
Higher	18.4	20.0	19.3

(Izquierdo 2008 649; based on INE, Encuesta de Población Activa.)

Nevertheless, 35% of immigrant workforce can be found in jobs that require little or no qualification; this percentage is twice as high as that for native workforce in the same labour segment (Observatorio DML 2007, 10). Izquierdo suggests there is a differentiation among immigrant groups by education, as follows (2008, 641): Africans are at the basic level, Latin-Americans in the middle and immigrants from Central and Eastern European countries at the top.

Although it may be hypothesized that a great number of immigrant workers occupy jobs that Spanish citizens are not willing to fulfil and that many of these jobs are below their educational level (cf. Observatorio DML 2007, 10), it may not be correct to assume that the Spanish labour market is segmented according to ethnic origin. In the first place, mismatches between a worker's current occupation and his/her received education and training do not only occur among immigrants, but also among native persons. Izquierdo qualifies this mismatch as "one of the endemic evils of the Spanish labour market" (2008, 642; see also García-Espejo & Ibáñez 2005). Moreover, many Spanish workers have gradually moved to higher echelons of work life, while large numbers of immigrant workforce can be found in low-skilled, low-quality jobs, but there are indications that this has to do more with the recent arrival of the bulk of immigrant workers in specific 'sectors of entry' of the Spanish labour market than with dominant tendencies of discrimination or the impossibility of upward mobility. Once settled, most immigrants tend to be just as motivated as Spaniards to move up in the labour hierarchy and grasp every opportunity to do so, which implies that at a later stage they will compete with Spanish workers for better-quality jobs. In conclusion, I see that the so-called substitution effect meaning that newcomers take the place of native workforce only occurs in immigrants' main sectors of entry into the labour market.

## Segregation and social exclusion

Several authors have explored whether we can find tendencies towards segregation between Spanish nationals and immigrants: i.e. can we differentiate immigrant and national workers according to occupation and salary, activity and unemployment rates, educational levels, age or gender? Segregation on the labour market may exist between men and women, among different age groups or ethnic groups. We speak of horizontal segregation when certain categories of workforce are concentrated in a small number of branches of activity or occupations; vertical segregation refers to the fact that some categories can be found mainly on the lower levels of the occupational hierarchy, while other groups concentrate on the upper end of the hierarchy.

According to Calderón and Hidalgo (2007), the horizontal (or sectorial) segregation between immigrant and national population grew from 1999 to 2006, but the level and evolution of this segregation varies by ethnic group. Thus, for instance, the segregation index is highest and growing, for European non-EU, immigrants, decreasing for citizens of Latin-American origin, and lowest for immigrants from other EU countries (2007, 23–24). Introducing gender, they noted that the segregation index for both men and women of immigrant origin was higher than that for national Spanish male and female workforce. At the same time, horizontal segregation among immigrant and national women was higher than among immigrant and national men.

Vertical segregation between national and immigrant workforce grew steadily in the first years of the new millennium. The index of vertical segregation between immigrant and native women was higher than the index for native Spanish men and immigrant men. Segregation between immigrants and native population with higher levels of education is also more pronounced than for those in lower echelons by education.

Categories of immigrants vary by economic and social vulnerability. Being a citizen of an EU country and a cultural-linguistic proximity of the immigrant to the target country are two main factors that facilitate labour market inclusion and make social exclusion more unlikely. The most vulnerable group consist of non-EU, irregular, immigrants – people who lack residence permits and often have deficient labour contracts if any. Nevertheless, we should note that under the Spanish welfare system these people do have access to health care and education for their children. Legal immigrants from non-EU countries have practically the same rights as EU immigrants and Spanish nationals; but unlike immigrants from EU countries, the former ones have the obligation to renew their work permits every few years.

Immigrants from EU Member States have the same rights as Spanish nationals, but this does not necessarily lead to their acceptance in society; or in other words, integration of immigrants in legal terms does not automatically imply their social integration. Izquierdo and León (2008) give a clarifying example: people of Roma origin are a minority within the Romanian immigrant community, but nevertheless, many Spaniards tend to identify all Romanians with gypsies – and aversion towards the gypsy way of life is rather widespread in Spanish society. When on 1 January, 2007, both regular and irregular Romanian immigrants in Europe became EU-citizens with all corresponding rights negative attitudes towards Romanians did not disappear overnight.

Table 9 compares levels of social exclusion by a number of important dimensions among Spaniards and citizens from EU-15 countries vs. with non-EU-citizens and immigrants from the new EU-12 member States.

We observe that percentages of non-EU citizens and immigrants from the new EU member States who experience social exclusion by the dimenbsions of employment (labour market), housing and consumption are more than twice as high as those for Spanish nationals and other EU-15 citizens. Political participation of citizens from outside EU-15 countries is virtually non-existent. However, the exclusion from education is extremely rare among non-EU citizens and immigrants from the new EU countries, even lower than among native Spaniards and EU-15 citizens.

TABLE 9. Households at risk of social exclusion in different dimensions in Spain; Spaniards and EU15 citizens vs. others

Dimension of social exclusion	Spaniards and EU-15 citizens	Non-EU citizens and citizens from new EU-12 member States
Employment	12.5	27.2
Housing	17.8	37.0
Consumption	8.0	17.6
Education	6.0	3.5
Health	10.8	16.6
Politics	4.3	89.1
Social conflict	12.3	16.4
Social isolation	7.5	9.2

(FOESSA 2008; in Laparra & Martínez 2008, 14.)

## Immigration and the crisis

Of course, the huge inflow of migrants into Spain of the last decade did not imply the end of emigration. The total population in Spain has increased with some 5 million people in the last decade, but at the same time, since 2006 more than 60,000 people per year have left the country (Izquierdo 2008, 616–617). Some of these emigrants were of Spanish origin, while others – probably the majority – were former immigrants who returned to their home countries or moved on to a third country.

In Spain, the ongoing economic crisis has led into a virtual collapse of the building sector, affecting especially large categories of immigrants. For instance, the number of Romanian construction workers losing their jobs was rapidly increasing: in October 2008, some 100,000 Romanian immigrants were unemployed; in a few months, hundreds of them had returned to their home country and many more were planning to do so.

Now that native workers seem to be willing again to enter those sectors where they could formerly hardly be found, many employers have started to substitute their immigrant workers for Spaniards. Other employers, however, employ a negative discourse with respect to Spanish workers to justify why they continue hiring foreigners: allegedly, immigrant workers are still more willing to do certain jobs and to work harder than natives (Izquierdo 2008, 644).

Izquierdo suggests that in periods of economic progress the majority of immigrants are men (and women) who arrive alone; when the boom continues, they want or let (at least a part of) their family come over to Spain. In periods of recession, when many migrants consider returning to their country of origin,

immigrant families – especially if they have school-going children – tend to stay and hold out longer than others (Izquierdo 2008, 625).

## Academic and political debates on immigration

Because immigration is still a relatively recent phenomenon in Spain, debates on key issues have hardly matured yet, and the most salient policy interventions relevant for immigration seem to have been the outcome of *ad hoc* decisions rather than the result of a thorough design. We may distinguish between political, public and academic debates.

According to opinion surveys carried out in 2008, Spanish citizens expressed greater worries about immigrants' cultural integration than about possible competition of foreign newcomers on the labour market (Izquierdo 2008). Labour-intensive sectors like construction, agriculture, the restaurant sector, and domestic services, characterized by cyclical or temporary, low- and medium-skilled jobs, had long faced a lack of native labour supply and thus absorbed the greater part of immigrants. However, now that the financial crisis has caused higher unemployment – to over 3 million in early 2009 – and many Spanish nationals have started to enter jobs they would not have accepted earlier, growing intolerance towards immigrant workers in certain sector of Spanish society may not be unlikely.

Thus far, there have been few xenophobic incidents in Spain. In spite of its regional – cultural and linguistic – differences, Spain was a culturally very homogeneous country until recently. The relatively extensive Roma/Gypsy community has mostly lived in the margins of society and has therefore hardly interfered with the general idea of cultural homogeneity among Spanish people. The high numbers of foreign workforce, and especially those of immigrants from Maghreb and Sub-Saharan regions, who differ most – culturally, linguistically and religiously – from the native population, may challenge the integration capacity of the country. Nevertheless, subjects like the 'multicultural society' or the 'social integration of immigrants' have not yet turned into topics of popular debate.

Neither is there a well-defined social integration government policy for immigrants. Arango and Sandell (2004) suggest that a full-fledged integration policy should cover such issues as legal inclusion, linguistic abilities, basic knowledge of constitution and constitutional rights etc.; it must be aimed at the inclusion of immigrants in the areas of labour market, education and housing. By and large, integration is, nevertheless, understood in Spain in a fairly narrow sense: as providing irregular immigrants with the necessary documents (*papeles*) which will turn them into legal residents. This was what, for instance, the 2005 regularization accomplished for over half a million undocumented immigrants living in Spain. However, the latest regularization campaign elicited intense debates both inside Spain and in other European countries: it was believed that the

legalization of such a huge number of foreign residents would have a strong pull effect on thousands of other potential immigrants. Other EU countries especially criticized that these measures had been taken without consulting other Member States. The Spanish Government argued that the regularization would serve to pull the majority of illegal migrants out of the informal economy, allow them to ascend to registered, better-quality jobs and convert hundreds of thousands of persons into new contributors (i.e. tax-payers) to the national welfare system. However, as stated earlier, according to Izquierdo (2008), it is not so much the regularization measures that have a pull effect on potential immigrants, but rather the existence of an extensive informal sector within the national economy.

## Immigration policy in Spain

*“Spain now has comparable numbers of immigrants to the old immigration countries of the EU, but it is still a long way off possessing the social policies required to meet the new challenges immigration presents” (Serra 2005, 5).*

Spain launched its first immigration law in 1985, when the country was about to enter the European Community – principally as a reaction to the fear of other European countries that the incorporation of Spain might open the door to huge inflows of people from Latin America and Maghreb. An update of this law came into effect in 2000 (Organic Law 4/2000), some five years after the migration influx had suddenly accelerated (CES, 2004: 83). Since then, several more updates of the latter law have taken place. Immigration policy in Spain has a twin-track approach: on the one hand, the policy focuses on the control of admission of immigrants and on the other, it is aimed at an integration of newcomers in the Spanish society. Since, until recently, immigration was still considered as a transitory phenomenon, policies tended to put more stress on the control of inflows than on measures enhancing integration (Arango & Sandell 2004, 9); special attention was (and is) given to the reduction of irregular immigration. The Spanish Government has developed a sophisticated system of border controls in the Strait of Gibraltar and the Canary Islands to stop illegal immigration proceeding from the coasts of Africa.

Since 1993, the Spanish Government has established annual contingents of immigrant workers who are hired in their countries of origin and then expected to supply the labour force for jobs that cannot be covered by the national labour market. The contingent measures are decided upon after consultation with the National Council of Immigration Politics, trade unions and employers’ organizations, and stipulate the numbers and characteristics of foreign labourers and the sectors where they are required. For about a decade, these contingents have oscillated between 25,000 to over 30,000 foreign workers each year (CES 2004, 90). Moreover, Spain has signed bilateral agreements with over 20 emigration countries stipulating

the regulation of immigration flows or the repatriation of irregular immigrants. However, considering the gap that exists between the legal influx of migrants and the high incidence of irregular immigration, the effectiveness of these measures in controlling migration flows may be seriously questioned (see also Figure 4.4).

There are several factors that explain why management of immigration flows was not particularly successful at the initial stage of the policy (CES 2004; also Serra 2005):

- Huge immigration flows were unforeseen (Serra speaks of an “historical surprise”; 2005, 23).
- Immigrants arrived in very few years and came from a wide variety of countries (in most countries in Northern Europe, different nationalities entered the country ‘one after the other’, sometimes with many years in between).
- Spain, being a former emigration country, lacked policy experience with immigration flows.
- It took a relatively long time before it was publicly admitted that immigration was a phenomenon that was ‘here to stay’ and therefore needed thorough analysis and a worked-out policy.

Inexperience and inadequate management has had some very negative consequences such as the high percentage of irregular immigrants; lack of cooperation with emigration (‘sending’) countries in managing the migrant flows; and deficient integration of immigrants in the labour market and society.

With the regularization campaigns, the Government of Spain achieved, in the first place, full incorporation of the regularized immigrants into the welfare system. As irregular immigrants they already enjoyed similar access to health care and education as legal migrants, but once they are ‘legalized’, they also contribute to the system as tax-payers. The 2005 regularization implied the incorporation of about 600,000 immigrant workers into the national social security system (Laparra & Martínez 2008). In the second place, the regularization of the situation of illegal immigrants helped to pull them out of the informal economy, often characterized by labour exploitation, social isolation, intervention of mafia etc. There is also adequate native workforce in the Spanish labour market for jobs that require high-level education and experience. Hence, unlike some other EU countries (e.g. the Netherlands), Spain does not have a specific policy aimed at attracting knowledge immigrants (Serra 2005, 20–21).

Since the beginning of the 1980s several other countries such as Italy, France or Portugal have also carried out a number of mass regularizations. It is generally assumed that one of the consequences of mass regularization is that newly ‘legalized’ immigrants start looking for jobs with higher payment or better working conditions (cf. CES 2004, 79); and since the jobs these immigrants leave vacant are generally difficult to occupy, employers often tend to turn to irregular labour force anew. Although measures of mass regularization are an exception rather than

the rule, the Spanish Economic and Social Council recognizes they have been one of the principal ways of access to legal work permits in Spain (CES 2004, 87, see Figure 4).

Izquierdo (2008, 634-635) criticizes the Spanish immigration policy, which in his view has aimed almost exclusively at supplying low-skilled labour force to the market. Such policy is highly insufficient and inadequate, for several reasons: not all migration flows are for economic reasons; return migration tends to be unpredictable; and it is hard to identify what types of employment the national labour market will need in the medium-long run.

## Integration policy

Izquierdo and León suggest that, until recently, there was an implicit aim behind the policy of allowing a “superfluous immigration” i.e. providing the national labour market with ‘handfuls’ of (irregular) workers. The regularization of no less than 1 million non-EU immigrants between 2000 and 2005 is, in the authors’ view, a clear reflection of excessive exploitation of foreign workers. In spite of the huge inflows of immigrants, the situation has not led into a collapse of the health or educational systems, nor has it given rise to xenophobic sentiments among the native population. However, it is expected that the arrival of millions of newcomers in less than a decade will not leave the social fabric unaffected. It is therefore essential to develop a consistent policy aimed at the integration of these immigrants as new citizens of the Spanish society. This implies “legal stability, occupational training for the unemployed, participation in local elections and opportunities for schooling and housing” (Izquierdo & León 2008, 13–14).

Izquierdo (2008, 604) affirms that the institutional discourse on immigration is an understandable consequence of Spain’s own history as an emigration country, and it is one of empathy with and acceptance of “those who flee hardships”, and suggests that it is this discourse that has hampered the elaboration of a National Integration Plan. At the same time, the author states that legal integration of immigrants (here: regularizations; also the conversion of both regular and illegal Romanian and Bulgarian immigrants into EU citizens as of 2007) has been more successful than their integration in the labour market, where temporary contracts and low upward mobility still prevail.

There are no defined rules as to how much time it should cost an immigrant to obtain permanent residency: it depends on the economic situation of the country, the willingness of the employer to help the immigrant employee, and sheer luck (Izquierdo & León 2008, 22). The possession of a permanent residence permit is one indication of an immigrant’s motivation to settle down permanently or at least for an indefinite time in the country of destination. Another indication is the integration of immigrant children into the education system. The number of

school-going immigrant youth increased from 108,400 in 2001 to 531,000 six years later; 85% of them were of non-EU origin.

In 2007, 37% of regular immigrants in Spain were in possession of a permanent residence permit. But this is an average percentage: the situation differs widely in different autonomous communities. For instance, in Extremadura, the percentage of immigrants with a permanent permit is 61%, while it is as low as 27% in the Community of Madrid.

## Immigration policies of the autonomous communities

Spain consists of 17 autonomous communities, whose regional governments have extensive competencies on a large number of major political issues. Some maintain that the Administration of the Spanish State is more decentralized than the Federal Republic of Germany. The Spanish central government has created a € 120 million fund to help the autonomous communities and municipalities to implement their integration policies. Those with higher numbers of immigrants receive an additional sum on top of the average amount for each community.

Thus, we should differentiate migration policies of national and autonomous institutions. Whereas competences of the central government refer to immigration and emigration (e.g. contingents, control of in- and outflows of migrants), regularization and asylum, the autonomous communities develop policies aimed at the integration of newcomers (through employment services, education, health care, and social services, cf. Izquierdo 2008, 605). Catalonia, for instance, has its own Citizenship and Migration Programme, aimed at integrating foreign workers in Catalan (instead of Spanish) language and culture. Izquierdo and León (2008, 22–23) highlight the lack of coordination of immigration policies among the different autonomous communities and the central government. The challenge is establishing an immigration policy that includes a coherent system of integration valid for all 17 autonomous communities in Spain.

## Immigration policy and the crisis

With the collapse of the Spanish building sector and the overall economic crisis, national unemployment figures have grown rapidly. Hence, competition for jobs between native Spaniards and immigrants has increased in sectors that until recently had hardly appealed to native workers, and the Spanish administration encourages unemployed immigrants to abandon the country. They will receive their unemployment benefit in their home countries, under the condition they sign a document promising not to return to Spain in the next three years.

However, at the initial stage this policy met with relatively low response among immigrants. As Izquierdo and León (2008) observe, inflows of migrants principally depend on economic up- and downswings in the country of destination, but return migration probably depends more on structural factors, like the level of family reunification or other factors which contribute to immigrants' rooting in the host society. Izquierdo (2008) suggests that the main aim of the government's return policy are issuing a symbolic message to Spanish citizens that 'the government is actively tackling the problem', and discouraging potential new immigrants to come to Spain – rather than effectively encouraging unemployed immigrants to return home.

## 5 HUNGARY: ROMA AND IMMIGRATION

VERA MESSING

In contrast to the old Member States of the EU, immigration to Hungary is a minor phenomenon, with immigrants comprising 1–2% of the population. Their vast majority (70%) consists of ethnic Hungarians from neighbouring countries. They are culturally and traditionally similar to the native population, of working age, they are welcomed by Hungarians and do not face problems that immigrants often have: they do not have language problems, do not encounter prejudice, discrimination, social segregation or exclusion, they are often highly trained and find work easily. In general, they are accepted as Hungarians by Hungarian society and thus do not require assistance to integrate. There are immigrants in Hungary whose status can be compared to the status of migrants in the old Member States of the EU (Chinese, Afghanistan, Pakistani, etc.) but their numbers are negligible. Moreover, most migrants of non-Hungarian descent consider their present residence in Hungary as one of transit towards Western Europe or the US.

Roma on the other hand, compose a considerable part of the population, their number exceeds half a million and they account for 6–7% of the total population. Their low education, long-standing discrimination against them and social exclusion create a number of unsolved social tensions in the Hungarian society.

### Data on the number of Roma

There is substantial uncertainty about the exact numbers of the Roma/Gypsy population. Methodological and legal obstacles in gaining such data are interrelated: due to data protection legislation, collection and processing data related to ethnicity meet a number of limitations. Because of historical fears related to expressing Roma identity<sup>1</sup> and exclusion of multiple identities, census data – based on self-reported single exclusive ethnic identity – underestimate the number and ratio of the Roma population to a large extent<sup>2</sup>. Another data source, yearly household surveys also significantly underestimate the proportion of Roma for two reasons: many live in segregated, isolated areas where interviewers are reluctant to go, and more importantly, Roma are not willing to identify themselves as Roma because of troublesome interethnic relations. Thus we have to rely upon various estimates based on a combination of census data, survey data and a mixture of ethnic self-definition and ethnic definition of the close environment. The same problems related to data-collection on Roma/Gypsy communities have also been encountered in other EU countries.

The most important data sources that may be used when assessing the number of Roma in Hungary:

- The National Census, which was conducted in 2001. The National Census includes questions with regard to belonging to an ethnic minority. The census only allows respondents to choose a single identity, consequently Roma with dual or multiple identities are unable to express their true belonging.
- Representative Roma/Gypsy Surveys in Hungary that were run in 1971, 1993, 1997 and 2003 in the Institute of Sociology, the Hungarian Academy of Sciences, led by István Kemény. The surveys applied combined methods based on the identification of Roma by the closest environment, self-identity and language use. This set of consecutive surveys is regarded as the data that best represent the reality of the Roma of Hungary. Still these data can only be used on a national scale; at regional and especially local level, they are not reliable.
- Estimation about the number of Roma in micro-regions and settlements based on the combination of school-level data and the census data. These estimations were produced by Gábor Kertesi and Gábor Kézdi in 1999 (Kertesi & Kézdi, 2000).
- UNDP conducted a regional survey on the Roma population in Central and Eastern Europe in 2004. In Hungary, the research was lead by TÁRKI. (Bernát 2006) Due to its limited methodology and scale, which was optimized for purposes of comparative East and South European survey, the data provided by this research are less reliable on a national level than those produced by Kemény and colleagues.
- Several surveys were conducted specifically about schooling and education of Roma children. The most exhaustive of these was conducted by Kertesi, Kemény and Liskó in 2000.

According to the census the ratio of Roma population is low in Hungary: 190,000 Hungarian citizens identified themselves as Roma or Gypsy in the census of 2000. In contrast, according to estimates based on a national survey of the Roma population (Kemény & Janky 2003), the population is approximately 600 000 i.e. 6–7% of the total population. The ratio of the Roma population in Hungary is expected to increase due to higher than average birth rates and due to younger than average population, although the life expectancy is over 10 years lower than for the rest of the population. A third set of statistics on the Roma population, commissioned by the UNDP, estimated the Roma population to be between 520,000-650,000 (Bernát 2006).

## Employment of Roma

As for the employment of the Roma population there is even more ambivalence in data, as it is against data protection regulations for the authorities to collect data disaggregated by ethnicity. Public bodies – the State Employment Office, Regional Labour Market Centres, and the Ministry of Employment and Social Affairs – that collect and record labour market data do not possess information on the ethnicity of their clients. The primary sources of data on the labour market situation of the Roma are therefore the aforementioned sociological research projects.

In order to understand the reasons behind the miserable labour market situation of the Roma in present Hungary we have to look backwards in history. During the state socialist regime (1949–1989) the Roma were formally employed, but employment was due to labour intensive industrial technologies and the fact that the legitimacy of the state socialist regime depended, among other things, on the concept of full employment<sup>4</sup>. Roma occupied the lowest level, worst paid jobs. Consequently, the changes after 1989 had dramatic consequences for the Roma people: most of those who had previously been employed – as low skilled workers, employed in the labour intensive heavy industry and agriculture – lost their jobs. The employment rate within the Roma population decreased from 77% in 1984 to 29% by 2003 (Kemény & Janky 2003). A massive loss of jobs characterized the Roma population in the years between 1989 and 1993, but these tendencies started already prior to the system change. In 1984 77% of the working age Roma, in 1989 67%, in 1993 only 31% and in 2003 29% of them had employment.

Kertesi (2005) presented an excellent comprehensive overview of the reasons and consequences of the labour market situation of Roma people after the system change. He argued that the low level of employment had stabilized: only 30% of the age cohort 15-49 is employed since 1993. The reasons are manifold: similarly to the entire Hungarian population some Roma made use of early retirement. Those working age Roma, who lost their jobs between 1989 and 1993 were unable to return to the labour market due to the lack of qualifications and jobs and became long-term unemployed. Young people, who would want to enter the labour market, are in equally miserable situation: they do not find employment due to the lack of jobs suitable for their qualifications, discrimination and unfavourable regional dispersion of the Roma population.

A very important factor besides the low level of employment is the instability of employment of Roma people. There is a very high turnover to and from the labour market among Roma (Kertesi 2005). Kertesi estimated that 40% of unemployed Roma lost their jobs within 2 years. The yearly rate of job-loss among working age Roma is estimated between 25–30%, which is an extremely high ratio. The reason behind this is twofold: firstly, Roma are typically employed in jobs where the cost of changing workforce is very low (low quality, unskilled work in building industries, agriculture) and secondly, the dominance for Roma of publicly financed work

programmes, which typically provide short term, low prestige jobs. Kertesi argues that the present labour market and welfare policies alone increase employment instability and trap low skilled, long-term unemployed in the welfare system and secondary (publicly financed) labour market.

Autonómia Foundation together with the State Employment Office conducted a survey on Roma people employed in publicly financed work programmes and found that approximately 14,000–16,000 Roma were employed in such programmes, which means that approximately 40% of working Roma are employed in this form of secondary labour market.

## Data on immigrant population

There are three sources of data on the number of immigrants in Hungary. These are the Central Bureau of Statistics (CBS), the Ministry of the Interior, State Immigration Office, and the State Employment Office. In sharp contrast to the case of Roma, the immigrant population in Hungary is minor, especially when compared to old member-states of the EU. The yearly rate of immigration has remained below 1% (0.5–0.7%) during the past 15 years (Rédei 2006). According to CBS statistics the number of immigrants was only 166,000 in 2007: they account for less than 2% of the total population. The vast majority of them – over 60% – are of Hungarian descent. They are ethnic Hungarians arriving from neighbouring countries (Romania 40%, Slovakia 30%, Ukraine 10%, Serbia 8%). The most important reasons for migration are employment (for 46% of immigrants with resident permit), family reunification (23%) and education (17%). (Hajduk 2008; Habcicsek & Tóth 2000; Gödri & Tóth 2004; Rédei 2005).

Despite the common stereotype of the dominance of Chinese among migrants the vast majority (85%) of all migrants arrived from European countries, and only 12% have Asian origins. Less than 9 000 Chinese reside in Hungary officially, although estimations refer to a much larger – double, triple – Chinese community. Chinese are visible migrants, who have established over thousand companies in Hungary, most of them micro businesses in catering (Chinese restaurants and buffets) and commerce (small shops, and market traders).

The majority of immigrants are of working age, highly motivated to attend higher education and to work, due to the better financial circumstances in Hungary than in their countries of origin. A new “secondary flow” of immigration has included elderly people, in the context of family reunification of ethnic Hungarians who arrived from the neighbouring countries. According to CBS data, the majority of immigrants come from urban areas and their educational level is higher than the Hungarian average in all age brackets: 29% of migrants had a higher education diploma and 37% had graduated from a secondary school. The corresponding percentages for the Hungarian population were 21% and 32% respectively (this data refers to 2002).

## Employment of immigrants

As recent surveys demonstrate, migrants (i.e. incoming Hungarian nationals) experience lower rates of unemployment than the respective socio-demographic groups of native Hungarians; most of them experience upward occupational mobility in comparison to their status in their home country (Habicsek & Tóth 2000; Gödri & Tóth 2004).

Data show (State Employment Office, 2004) that the vast majority of migrants with a work permit (85%) arrived from the three neighbouring countries: Romania, Slovakia and Ukraine. Since Romania joining to the EU, Romanian citizens may work without any special limitations in Hungary. Despite earlier worries, this development did not produce a radical increase of the presence of Romanian citizens in the Hungarian labour market; conversely, it resulted in the decrease of Romanian migration to Hungary. As known from European migration data<sup>5</sup>, following Romania's EU access, Romanian workforce migrated primarily to Spain, Italy and other old member-states of the EU rather than to Hungary. As a consequence of these developments, migration from Romania to Hungary, especially migration aiming at employment has significantly decreased since January 1<sup>st</sup>, 2007. According to statistics of the State Employment Office the applications for work permits of Romanian citizens decreased by 30% in the first 9 months of 2007 compared to the previous year.

Similarly to the small number of immigrants in Hungary, the number of foreign children in education is not significant. Out of a school population of 1,880,816 around 12,500 foreign students were registered as attending Hungarian public education (Kováts & Medjesi 2006). More than two thirds of foreign students (8,546) were of Hungarian ethnicity (mainly children of ethnic Hungarians from Romania, Slovakia, the Ukraine and Serbia).

## Academic and political debates on Roma and immigrants

Debates on the situation of Roma are intense both in the public, political and academic arena. The following section will sum up and categorize major topics of discourse in the public and academic sphere. Debates on immigrants are much less intense in Hungary.

## Reasons behind low and unstable employment of Roma

In the mid 1990s the employment rate of Roma workers was not only extremely low, but also highly unstable (Kertesi 2000). Economic transition caused increasing regional differentiation and inequalities that had a disproportionate effect on the Roma, forcing them to engage in expensive commuting, participate in the illegal labour market or appeal to the social welfare system. Besides, the spread of unstable employment led into social disintegration: the lack of permanent employment brought about irregular income, lack of a stable lifestyle, continued worries of subsistence, little protection from majority institutions, lower level of social transfers from the state and the employers – or even the loss of previous entitlements (Szalai 2005; Messing 2006; Kertesi 2005).

Besides the unfavourable geographical distribution and low educational level of the Roma population policy measures may contribute to the instability of their employment. Public work programmes that aimed at increasing employment of the long-term unemployed actually perpetuated the instabile employment: these programmes typically offer irregular, short-term (couple of months) employment in low prestige jobs, contributing to negative social stereotypes, making dependency on the welfare system permanent, and reinforcing the lack of protection from the authorities. (Kertesi 2005; Fleck & al. 2006.)

## Racial discrimination on the labour market

Another segment of research and debates in Hungary focuses on labour market discrimination. There are three bodies that receive and investigate complaints of discrimination: Equal Treatment Authority (ETA), the Legal Defence Bureau for National and Ethnic Minorities (NEKI) and the Roma Antidiscrimination Service of the Ministry of Justice. According to the experience of these bodies, discrimination against Roma is widespread in the labour market. ETA is the authority that establishes whether a complaint fulfils the legal prerequisites of discrimination and it has the right to fine discriminating employers, or other public actors. NEKI, an NGO, investigates racial discrimination regularly by testing companies according to incoming complaints. According to NEKI's experience 8 out of 10 clients' complaints are valid: in these cases repeated testing by Roma and non-Roma job applicants confirmed the accusation of racial discrimination: Roma applicants are usually told that the position has been filled, while non-Roma applicants later are accepted. NEKI published a report on racial discrimination in the labour market in 2004 (Bodrogi and Iványi 2004) reviewing practices of racial discrimination at different stages: discrimination against job applicants, discrimination during selection procedures, discrimination in the workplace, discrimination through public work.

A survey by Delphoi Consulting Ltd. (Babusik 2006) among Hungarian companies (with more than 10 employees) collected data on discriminatory practices in employment. The research, which collected data from 1 800 companies and 530 regional Employment Office members of staff, provided a new type of data: corporative, i.e. company level data on practices leading into discrimination against disadvantaged groups, especially the Roma, but also immigrants and asylum seekers. Its major conclusion is that the Roma are excluded from the labour market not only because of their disadvantaged educational situation but mainly due to the negative attitudes of employers: over 80% of employers interviewed stated that he/she would not employ Roma even if his/her qualification fit requirements. The study also pointed out, that labour market subsidies aimed at the inclusion of disadvantaged groups do not influence discriminatory practices: companies that exercise racial discrimination are able to obtain such subsidies as much as companies that do not discriminate.

### Work in return to welfare allowances

An open letter of a mayor of a small village in North East Hungary provoked heated public and policy debate on the functions and consequences of social benefits in the summer of 2008. The mayor's argument, which was supported by a great number of local politicians can be summarized as follows "those should get benefits who work for it and who comply with the majority standards". The North Eastern region of the country is an economically highly depressed part of Hungary where unemployment – especially long-term unemployment – is highest and where the proportion of Roma is also decisive. Social problems and tensions are soaring: even those who have a job get a modest earning and masses of families with a large number of children live solely on social benefits and income from informal employment (badly paid day-labourers in agriculture and constructions). This tension has often an ethnic bearing. According to the mayor's proposal the long-term unemployed, receiving social benefits should be obliged to work in public work programmes.

Roma activists as well as sociologists argued that the proposal was misleading, because it blames the victims: it presupposes that a large number of long-term unemployed do not work because they are lazy, are not willing to work and are free riders living on the generous social security system. In contrast, most long-term unemployed would be happy to work, but there is no opportunity for low skilled unemployed in the region. Nevertheless, they take the worse paid, dirtiest, physically hard and insecure jobs on the informal labour market. Economists argued that a problematic point in this proposal is that it interferes with labour market equilibrium: the demands of the labour market are met with public work paid by the social welfare system and consequently the balance of

demand and supply in the labour market will be distorted. Long-term unemployed people would, thus, only replace other workforce for a much lower income. Cheap workforce may be desirable for local government, but undesirable at the national level, according to this argument.

## Subsistence strategies, communities

Anthropological research provides in-depth knowledge on the living conditions, life-style and subsistence strategies of various Roma/Gypsy communities. Despite extensive public and political discourse on the Roma population there is relatively little knowledge about how in fact Roma communities survive. Fleck, Orsos and Virag (2000) provided an in-depth insight into the subsistence strategies of an impoverished Boyash community in South East Hungary. They mapped families in these communities, their sources of income, employment and other income-generating activities and showed that only the privileged families have a low paid, but stable income. Most families have to rely on various income sources i.e. welfare assistance (including family allowances), irregular and badly paid seasonal jobs, collecting crops from the forest and wood for heating.

Another study published by Stewart (1994) presented everyday life, values and subsistence of a traditional Vlah Gypsy community. Szuhay's earlier study gathered information on and described traditional Gypsy communities and related traditional occupations prevalent in Hungary (Szuhay 1997). Messing (2007) analysed data on income sources, subsistence and social networks of Roma and non-Roma poor families. She found that most of Roma poor have lost supporting social networks and are isolated not only from the majority, but also from Roma communities. The public imagines Roma as traditional communities based on extended families but this situation rarely exists today; most of the impoverished Roma became totally isolated.

Despite the fact that there is very little research on the identity of Roma/Gypsy people and the impact of this identity on social and labour market inclusion, one can say that there is substantial evidence for the assumption that social and labour market exclusion is mostly due to low social capital (low level of education, disadvantaged family background, lack of social networks) on the one hand, and to discrimination based on wide-spread prejudice on the other hand. There is no evidence for the hypothesis that social and labour market exclusion are the product of some distinct culture or ethnic identity of Roma people.

## Debates on immigrants

There is very little public and political debate about the role and consequences of immigration in Hungary. Public debate is generated periodically, usually due to generalizing, populist statements made by political actors. Such a public debate went on following the declaration of an MP of the FIDESZ (conservative party) alerting that the government plans will lead to the arrival of 1 million Asian immigrants. Another public debate was generated by plans of providing “Hungarian passes” to ethnic Hungarians being citizens of one of the neighbouring countries. The Socialist party opposed these plans and alerted the public with potential immigration of tens of millions of migrants. These instances prove that besides the complete absence of meaningful discourse on the social and economic effects and consequences of immigration in Hungary, rare debates focus on few populist declarations.

András Kováts, an expert in migration policy, analyzed policy debates on migration in 2008. He found that public discourse on migration is dominated by arguments on refugee policy. The particularity of the Hungarian migration and discourse is the special role and status of migrants of Hungarian decent, the role and responsibility of the Hungarian state towards ethnic Hungarians in the neighbouring countries. Public policy debates do not refer to the – mostly positive – demographic consequences of migration: the Hungarian population, similarly to what is happening in industrialized European societies, is ageing; migration could ease tensions caused by ageing of the society.

## Roma and immigrant policies in Hungary

### Policies towards Roma

The focus of policies aiming at Roma population is on active labour market policy, primarily employment programmes and connected trainings. One has to emphasize that such policies are extremely turbulent and their focus as well as financial frames might change each year, and by each 4 years of parliamentary circles. Despite the fact, that the ethnicity of a client can not be recorded, most of such programmes aim at “socially disadvantaged, long-term unemployed, with a special focus on Roma population”.

I may repeat also in this context that a study on Roma employment published by Kertesi (Kertesi 2005) provides evidence for the hypothesis that public work and active labour market programmes aimed at increasing Roma employment have an important side effect: they increase the instability of employment of the target population. A large ratio – approximately one-fifth – of working age Roma population is employed by such programmes.

The same paper provides recommendations for labour market policy. The author sees the strong decentralization of the public work system, which delegates responsibility to the municipalities, as a major problem. He argues that the present system of public work increases regional inequalities to a large extent, as well as greatly fragments local labour markets. He also argues that long-term unemployed, marginalized poor are extremely vulnerable in the present system, as they are exposed to the municipality's good-will not only in terms of welfare subsidies, but also in terms of employment possibilities that would entitle them to receive welfare allowances. He also points out that public work does not change the employability of long-term unemployed, but instead of being an element of labour market policies it is rather an extension of the social welfare system. He proposes drawing up complex rehabilitation and integration programmes in regions with multiple disadvantages and a large Roma population. The present miserable situation is the product of various, interrelated and intermingling causes, consequently policies should focus on various spheres of social marginalization: employment, education, housing, local economy, social care and health care. Another paper dealing with the social welfare system argues in a similar vein: delegating responsibility of social care and social employment of marginalized groups to municipalities (that are as poor as their inhabitants) makes clients – especially Roma clients – even more defenceless to authorities (Szalai 2005).

The most recent policy action tackling tensions between work and welfare titled "Path to Employment" has been adopted and came into effect in January 2009. The policy measure linked welfare allowances to compulsory participation in public and communal work programs. The reasoning behind the new regulation was that the present social welfare system does not motivate the long-term unemployed enough to return to the labour market. Household income might be higher in a family with 3 or more children without an employed adult (social benefits, child allowances), than in a household with 2 children and an employed parent. This programme may be seen as a modification of the act regulating welfare allowances and social benefits. The essence of the regulation is that it divides the population entitled to a regular social benefit (230,000 individuals) into two categories: those who are potentially able to work and those who are not. The second group continues to receive current regular social allowances, but the first group is obliged to partake in public work or, if the applicant is younger than 35 and has not completed primary school, s/he has to take part in public education till s/he finishes primary school.

The new act was understood as a great victory of local politicians, but has been criticized by experts. The main criticism says that public work programme is a type of active labour market programme which is least suitable to support employability of the long-term unemployed according to international and national experience. In the Hungarian scene some of the research mentioned earlier in this chapter (Kertesi 2005; Fleck & Messing 2005, Váradi 2010) demonstrated that, in fact, public work programmes have a negative effect on the chances of getting employment on

the primary labour market due to its low prestige, zero effect on employability, short term and irregular nature. The new act is also criticized for lacking means for implementation.

The next set of policies of relevance here focus on further active labour market measures. The Autonómia Foundation, with the support of ILO and UNDP, prepared a study on Roma Labour Market Programmes in 2003 (Csongor & al. 2003). The study provided an overview of subsidized labour market programmes aimed at Roma citizens of working age. It distinguished among three types of programmes:

- Governmental programmes including Roma employment programmes of the National Public Foundation for Employment (Országos Foglalkoztatási Alapítvány – OFA), Phare programmes, and social land programmes.
- Non-Governmental Initiatives including programmes of the Autonómia Foundation – Foundation for Self Reliance and programmes of the Public Foundation for Romany in Hungary.
- Public work and “socially useful work” programmes.

Estimates provided by the Employment Centre and by the Ministry of Economy concerning Roma participants in Hungarian active labour market programmes (ALMP) differ widely: according to Employment Centres 17,000 Roma people have participated, while the Ministry of Economy estimates that the number is almost twice as high (31,500). The numbers of Table 1 demonstrate that public work programmes represent a key sphere of ALMP for the unemployed Roma, on the one hand, and Roma represent a large proportion of the participants in these programmes, on the other hand.

Another study commissioned by the Ministry of Employment Policy and Labour examined Labour Market Programmes directed at unemployed Roma and it came to similar conclusions (Fleck & al. 2006). The study provided a thorough examination of all government and NGO active labour market programmes aiming at increasing Roma employment. The research included employment programmes, training, active labour market programmes, public work programmes and corporate development programmes for companies which employ Roma workers. Results were disappointing: despite the relatively large number of programmes targeting unemployed Roma, very few demonstrate convincing outcomes. It is uncommon that Roma people participating in employment programmes remain on the labour market once the programme is finished.

TABLE 1. Roma participants in active labour market programmes: estimates provided by the Employment Centre and the Ministry of Economy (N, %)

	Total	Roma Participants (Employment Centre)	%	Roma Participants (Ministry of Economy)	%
Active programmes in total	135,792	17,025	12.5	31,500	23.2
Retraining	40,621	3,206	7.9	4,400	10.8
Socially useful public work	34,414	7,531	21.9	17,300	50.3
Local public work	9,521	2,697	28.3	-	-
Large-scale public work projects	4,797	2,115	44.1	3,800	79.2
<b>PUBLIC WORK TOTAL</b>		12,343		21,100	
Wage subsidies	20,364	1,479	7.3	1,800	8.8
Travel to work subsidies	4,306	354	8.2	160	3.7
Payment of social charges on wages	5,096	864	17.0	800	15.7
Other programmes	11,971	852	7.1	400	3.3
Special Roma programmes	-	2,782	-	2,450	-

(Csongor & al. 2001, 13.)

A more recent study, published both in Hungarian and English (Fleck & Messing 2010) overviews public policy approaches and actual measures aiming at the inclusion of Roma and other socially marginalized groups into the labour market. The study outlines three major approaches that characterized public policy approaches in the past decade. Until the early 2000s color conscious policies characterized government measures: various Roma employment programs were constructed and conducted, which aimed to enhance the employment of Roma and compensate for the effects of labor market discrimination they face, primarily by implementing Roma (i.e. ethnically targeted) employment programs. Colour conscious policy measures failed to reach the Roma and to improve the labor market position of those involved in the programs. This approach was replaced by color blinde policies in the after 2002. Although populations truly in need could be accurately defined by territorial, social and educational traits taken together, this practice nevertheless failed to produce the expected results. Apparently, the agents implementing the programs (various ministries) considered such definitions too narrow, as their proposals contain simplified categories like 'the unemployed', those 'having a large family', or with 'low educational degree', despite the fact that exactly the intersection of all these categories would have represented the group of those

truly in need. As a consequence, these programs, as well failed to reach their target populations (Fleck & Messing 2010).

The study by Fleck and Messing (2010) formulated a number of policy recommendations. The most important of these point out some key needs:

- need to design complex micro-regional development programmes that focus simultaneously on various elements of social disadvantage (education, health, social welfare, labour market, economic competitiveness);
- need to replace public work programmes that do not increase the employability of the clients with active labour market programmes combined with meaningful training;
- need of professional support and monitoring, since without professional support and regular monitoring even projects implementing very good ideas go bankrupt as they lack management, financial and human resources and professional skills and experience necessary for running a business;
- need for greater transparency.

## Immigration policies

The Hungarian Government's migration policy was published in a policy document entitled Migration Strategy, issued in 2007. It defines migration strategy in the context of a general national security strategy.

There are three salient elements of immigration policy in Hungary: (1) control of migration, (2) policies concerning refugees and asylum seekers (3) policies with regard to ethnic Hungarians residing in neighbouring countries. There is hardly any reference to the regulation of general labour migration, and very little thinking about possible consequences of immigration with regard to the Hungarian labour market. As mentioned above, immigrants in Hungary possess higher than average education and are much younger than the native population, therefore, immigration could be favourable to Hungary.

## 6 ROMA BETWEEN LABOUR MARKET AND WELFARE IN SLOVAKIA

ZSUZSANNA VIDRA, VERA MESSING

### Demographic, labour market and socio-economic data on Roma in Slovakia

#### Roma during communism

Due to the integration efforts and the labour market policy of the communist regime, by the 1980s the majority of Roma men were employed (according to the 1980 Census, 85% of Roma men and 85% of men of the total population were economically active). The employment rate of Roma women was lower than that of the total population (45%, as opposed to 77% of the total female population). The Roma were mostly employed as unqualified manual labourers in industry, public services or agriculture (Kusá & al. 2008a).

Following the political and economic changes as well as the dissolution of Czechoslovakia, the Slovak economy suffered severe depression. The GDP declined by 23% in the early 1990s, the agricultural sector went through serious crises whereby production decreased by 43%. The public sector dismissed 1.3 million people at that time, when employment in industry had fallen by 24% (Kusá & al. 2008a). The Roma population was gravely hit by the crises given the low educational level that made them a most vulnerable group to be excluded from the primary labour market.

Another important factor that influenced the situation of Roma after the changes was the involuntary return of jobless people from the Czech lands. Out of the 314,000 people originally from Slovakia 291,825 received Czech citizenship<sup>1</sup>. The remaining 22,000 had to leave the country and return to Slovakia where they did not have a job or a house. There are no data as to how many of them were Roma, but it is assumed that probably a high proportion were of Roma origin (Kusá & al. 2008a).

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<sup>1</sup> One of the most important policy measures of the communist government towards Roma was the “resettlement”, i.e. forced migration programme in former Czechoslovakia. In the late 1950s the government aimed at settling the wandering Roma in the Czech lands even if most of them were living in Eastern Slovakia. However, for the lack of jobs in the Slovak part of the country, thousands of people were forcefully recruited to work in the Western regions of Czechoslovakia.

## Data collection on the Roma population

As in most Central and East European countries, partly due to the strict personal data protection laws, disaggregated data by ethnicity is very rare and only available when specialized data collection is carried out. These are usually done either by international organizations (such as the UNDP or the World Bank) or research institutes that undertake focused surveys on Roma. The Slovak Statistical Office (SO) collects ethnic data based on self-identification in the course of the census. Roma are very much underrepresented in the sample compared to their estimated number due to the same factors as in Hungary, described in detail in the previous chapter. During the 1990s there were no other data available on the Roma population but the census data. There was only one another attempt, under EU pressure, to produce statistics on the Roma population: the SO engaged in collecting data on Roma settlements and their inhabitants based on questionnaires filled in by mayors. Then the World Bank (2002) undertook a study on the poverty of Roma and the welfare system, however, this was not a representative survey but a case study carried out in three settlements. The same year, the UNDP and the ILO (2002) published a comparative survey on the situation of Roma minority in five CEE countries (Bulgaria, Czech Republic, Hungary, Romania and Slovak Republic) based on comparable socio-economic data from a cross-country survey among 5034 respondents representing the region's Roma population. In 2004, the World Bank funded a project entitled the "Sociographic mapping of Roma settlements in Slovakia" and it gives to date one of the most reliable and precise data of Roma housing and living conditions. In 2005, with the support of the World Bank, the UNDP (2006) undertook another representative survey to give an assessment of the situation of Roma in Slovakia.

## Roma population; basic demographic data

Although it is well known that the census data from the socialist period are distorted and the Roma population is underestimated, this is the only database that can serve as a basis for comparison. In the 1970 census 3.5% of the total population of the Slovak part of the country, 159 275 people, declared themselves to be Roma. In the 1980 census the number had grown to 199 853, representing 4% of the population. After the political regime change, the first census took place in 1991 when only 1.4% of the population in Slovakia identified themselves as Roma (75 804 persons). Ten years later, during the 2001 census, slightly more individuals – 1.7% of the population (89 920 people) – stated they belonged to the Roma minority.

Given that all census data are very unreliable, there are several estimations by various organizations and interest groups that try to assess the real number of Roma. The estimates by local governments and Roma leaders are quite close to that of the

London-based Minority Rights Group NGO. The first figure is between 420,000 and 500,000 and the second one is between 480,000 and 520,000, representing 9–10% of the total population (World Bank 2002, UNDP 2002). The Demographic Research Centre speaks of 380 000 Roma, i.e. 7.2% of the total population. (Vaňo 2001, in UNDP 2006.)

The birth rate of the total population has been declining, dropping from 15.2 live births per 1,000 in 1990 to 10.7 in 1998. In contrast, that of the Roma population has been increasing (World Bank 2002). The average age of the Roma population was around 24 years in 2004, in contrast to 36 for the total population. (UNDP 2006) The huge difference may be attributed to two intersecting factors simultaneously: higher number of children and lower life expectancy among Roma when compared to the ethnic majority population. There is also a strong correlation between the settlement type and the above mentioned demographic factors: the highest number of children per family and the youngest population of Slovakia live in segregated settlements. ECOHOST's estimates concerning the life expectancy of the Roma says that Roma men live 12 years and women 15 years shorter on average than their Slovakian counterparts (55 years in contrast to 67 years for men and 59 years in contrast to 74 years for women) (World Bank 2002). The gap is huge in demographic sense and may be explained by unreasonable living conditions, extreme poverty and limited access to health care and healthy lifestyle.

## Regional distribution, spatial segregation and some characteristics of the socio-economic situation

The geographical distribution of Roma is very unequal across the country: two thirds of the Roma are concentrated in Eastern and Southern Slovakia in 9 districts all of which are situated in three regions: Košice, Banská Bystrica and Prešov (World Bank 2002). In Košice 27% and in Prešov 33% of the population is Roma (Kusá & al., 2008a).

Regarding Roma settlements, data on the location and condition of Roma housing were collected by sociographic mapping. Altogether 1,575 settlements were identified as inhabited by Roma. Half of them (776) were considered mixed settlements where the Roma live integrated among the non-Roma. There were three more categories of settlements: communities where the Roma live concentrated in a street or a district (177 communities); communities located at the edge of villages or towns (338 communities); and communities spatially separated by natural or artificial barriers (284 communities). In addition to this categorization, distinction was made between separated and segregated settlements, the latter indicating location without access to water mains and where the proportion of undocumented housing reaches 20%. There were 149 communities with about 120,000 to 150,000 residents of this kind. Moreover, out of these 149 there are 46

settlements lacking any infrastructure (National Strategy Report 2008; Kusá & al. 2008a). These data refer to the fact that a significant proportion of Roma in Slovakia live both spatially and socially excluded, in circumstances that would qualify for 'third world' circumstances.

Concerning the poverty rates in the Slovak Republic during the 1990s, two major phenomena have to be highlighted. The 1996 microsurvey revealed that the absolute poverty rate compared to other countries in the region was low, with 4.30 dollars per person per day. At the same time, the number of people living under the poverty line of 2.15 dollars per person per day was twice as high as in e.g. Hungary and Poland. Thus, it was concluded that there was a significant part of the population living in deep poverty, or as it was often termed, there were important "pockets" of poverty, and these were concentrated in regions with high proportions of Roma (World Bank 2002).

The data collected by the UNDP (2006) on subjective assessment of poverty are in compliance with the above conclusions. On a ten-point scale (one referring to the poorest, ten to the richest) 57% of the Roma population placed themselves in the lowest two categories whereas only 19% of the non-Roma population said they belonged to these categories. Moreover, the majority of the general population (54%) assigned itself to the fourth and fifth category, meaning that they felt close to the average. According to settlement types, a huge difference was discovered. 43% of Roma living in segregated settlements considered themselves and their households to be very poor (worst off), whereas in separated and mixed settlements it was only 27%.

The main conclusions are that poverty in Slovakia is significantly concentrated in certain regions heavily populated by Roma and within these regions the poverty situation is further worsened by spatial factors.

## Educational level

According to a survey carried out in the early 1990s (Vašecka 2000), 56% of Roma men and 59% of Roma women had not completed primary education (World Bank 2002). Apparently, the situation has somewhat improved since the 1990s. In 2006 the UNDP survey found that 35% of the total Roma population had not finished primary school and about 37% had primary education as their highest level of education. In comparison: this proportion was only 7% for the total population in 2007 (National Strategy Report 2008). Altogether 24% of the Roma went on to secondary education but about 9% dropped out and only 15% succeeded in finishing it. The proportion of Roma students in higher education was as low as 0.2%. The majority of Roma who benefit from secondary education go to vocational schools and only a few continue towards academic or comprehensive tracks after primary school (UNDP 2006).

Racial segregation in schools is a prevalent phenomenon in Slovakia. Besides spatial segregation several factors contribute to the fact that a significant proportion of Roma children attend schools or classes separated from their non-Roma peers. While Roma are estimated to comprise less than 10 per cent of Slovakia's total population, they make up 60 per cent of the pupils in special schools. One factor is institutional: special schools for mentally handicapped children have become an institution contributing to segregation as well as to the low school attainment level of Roma pupils in Slovakia. Once enrolled in a special school, pupils will have the least chance to go on to secondary education and, thus, to better opportunities on the labour market. Many of the Roma children are placed in special schools for reasons of the lack of command of the Slovak language as well as because of the cultural unfairness of the diagnostic tests on which psychological and pedagogical decisions are based and also by the push towards separation by the schools and 'white' parents. This involves that disadvantages deriving from the different cultural and social environment in which children have been socialised are treated as mental handicaps. Besides the biases of the tests, some serious procedural problems exist violating the current legislation, and they have not been overcome despite the fact that the State School Inspection has exposed these problems at several occasions. There has been one governmental pilot programme addressing the problem of special schools. "Transition classes" were introduced to help Roma pupils back to the mainstream education from special schools. In 2007, 20 schools participated in the programme involving 162 children, but at the end only a couple of the pupils were transferred to standard classes (Kusá & al. 2008b).

Segregation in education is most probably increasing: according to the UNDP findings (2008, 22-23) 4% of Roma in Slovakia attend or attended special schools, while for those currently in school age this proportion reaches 15% in ethnically segregated and 9% in mixed settlements. Another research found that in the Prešov region – with the highest density of Roma population – the share of Roma in these types of schools was 28%, in contrast to 11% in the whole country and 62% of Roma children were enrolled in special schools in the region as opposed to 3% for the total school age population. The researchers point out that since the results are based on information from Roma, it is possible that in certain schools the share of Roma pupils reaches 80% (Kusá & al. 2008b).

Besides the widespread practice of placing Roma pupils in special schools, there are other forms of separating Roma and non-Roma children. In the case of segregated settlements, it is very rare that parents take their children outside the district school, thus all school-aged Roma children coming from the settlement go to the same school that is evidently ethnically homogeneous. Very often, in ethnically mixed schools there are segregated classes, justified by their different performance levels, or segregated clubs and canteens for the Roma. Some of the programmes with the aim of addressing differences in school performance may have a counter effect of enhancing ethnic segregation. Catch-up classes often become segregated

classes with only Roma pupils attending them. Another problem is white flight: once the proportion of Roma pupils reaches a certain level in a school, non-Roma parents decide to take their children to other schools (Kusá & al. 2008b).

Amnesty International has urged the Slovakian government to take measures to end segregation of Roma children in schools, a practice that leaves thousands of Roma pupils in substandard education in schools and classes.

## The labour market situation of the Roma

The National Labour Office collected data on ethnicity in Slovakia until 1997 and later the Office had unofficial figures on the Roma. According to these estimates, 17–18% of all unemployed were Roma in 1996. Geographical differences are huge: 40–42% of all unemployed in Eastern Slovakia were Roma. In certain areas and settlements, however, the total Roma population was totally ousted from the labour market (Kusá & al. 2008a).

A couple of years later, in 2004, the official unemployment rate presented by the Office of Governmental Plenipotentiary for Roma communities (OGPRC) was 80% (Kusá & al. 2008a). Similarly, the 2006 UNDP survey found that 72% of working age Roma men and 52% of women were officially outside employment (unemployed, economically inactive etc.). The unemployment rate differed, again, according to settlement type and spatial segregation: the more segregated Roma lived the higher was the proportion of those excluded from the labour market (Kusá & al. 2008a; National Strategy Report 2008).

The employment rate was as low as 11% for Roma men and 5% for women according to the UNDP survey, which asked whether the respondent was regularly working. There were significant differences between settlement types: it was found that people from segregated areas had the worst employment rates (both men and women) and those from ethnically mixed areas had above-average employment rates. In the study among the control group, i.e. the general population in nearby areas, the rate of employment was higher but still very low: less than half of non-Roma were in some kind of employment in these areas of the country (National Strategy Report 2008).

The UNDP research (2006) stated that the long-term registered unemployment rate is not significantly different for the Roma and the non-Roma control population, except for one important thing. The main difference between the long-term unemployment patterns of the two populations is that non-Roma are usually unemployed for a shorter period of time.

TABLE 1. Length of unemployment spells among the Roma by settlement type (%)

Unemployment spell	Segregated	Separated	Mixed	Total
Less than 6 months	9.8	10.4	9.0	9.7
6 months – 1 year	16.7	16.5	10.7	14.4
1–2 years	17.8	20.0	16.6	18.0
2–3 years	9.5	10.4	7.6	9.1
3 years and more	46.2	42.6	56.1	48.8
Registered unemployed total	100.0	100.0	100.0	100.0

## Roma labour migration

There is few data available on Roma emigration during the past two decades. The first important wave of data collection took place in 1997–1999 when between 1,000 and 1,200 Roma from Slovakia applied – rather unsuccessfully – for asylum in the UK and Finland. The International Organization for Migration carried out research in 2000 to describe the emigrant population and it discovered that contrary to the expectations the majority of the migrants were of working age (24–40) from urban areas in Eastern Slovakia (World Bank 2002). Apart from the generally poor living conditions and labour market opportunities, the 1998 labour market Act that halved social assistance for the long-term unemployed, seriously effecting the Roma population, might have had an impact on the increasing level of migration from that part of the country where many Roma lived without perspectives of succeeding (Kusá & al. 2008a).

According to the Labour Force Survey data, 7% of the total Slovak economically active population works abroad which amounts to the share of 15% in Prešov region in Eastern Slovakia. Although there is no data on the ethnic composition of the emigrating population, it is assumed from local observations and irregular school attendance of children that in fact many of these people are Roma (Kusá & al. 2008a).

## Slovakian welfare and labour market policies; impacts on Roma

Social policy was reorganized based on universal principles emphasizing the human rights after 1990 in Slovakia. The new approach has had both negative and positive impacts on the Roma population. On the one hand, social benefits became unconditional, e.g. family allowance was not linked anymore to school attendance of children and the maternity leave was not linked to medical visits during pregnancy. These measures emphasized the individuals' right to freely

make decisions concerning their life. On the other hand, the district networks of social workers dealing mainly with Roma were abolished claiming that no targeted programmes should exist for they stigmatise the given population. These measures were regarded and applauded by most scholars and intellectuals as empowerment contrary to previous state paternalism in the first half of the 1990s.

The tendency was further strengthened by the practice of abolishing data collection based on ethnicity; it was later on codified in the 2002 Act on personal data protection. Thus, it became impossible to monitor how policies affected Roma in general or their subgroups. This practice of “ethnic invisibility” in statistics did not prevent the central government in the majority of the cases to use the “blaming of the poor” – and especially the Roma – argument to justify policy changes. It is only a recent change in practice and discourse that ethnic data collection is seen as a necessary tool to assess the effects of welfare and labour market policies on one of the most vulnerable groups, the Roma. In 2008, a resolution was passed under civil pressure, to change the legislation on personal data protection (Kusá & al. 2008a).

As regards to the concrete policy measures, in the 1990s the main assumption on which the social policy of the country was based was that high rate of unemployment would be a transitory social phenomenon. Therefore, the minimum subsistence level for the eligibility of social assistance was introduced in 1991, providing benefits on a universal basis supposing that “people will live on minimum subsistence income only for a short period and they have a real opportunity to improve their situation by their own effort” (Kusá & al. 2008a, 30).

In 1998 a new Act on social assistance came into force making a difference between subjective and objective reasons for material need. Those who fell in the category of subjective reasons were entitled only to 50% of the minimum subsistence. A very important part of the Act was that long-term unemployed (more than two years) were categorized as having only subjective reasons for social assistance (Kusá & al. 2008a).

Several social and labour market policy reforms were introduced which affected the socially marginalized Roma severely in the period of 2002–2004 in Slovakia. First, social benefits were cut for both the subjective and the objective categories and the amount was maximized (309 Euros) for households irrespective of family size. The next important reform came with the intention to combine active labour market instruments and social assistance in order to reduce welfare dependence and increase work incentives (or, as the political slogan went, “make work pay”) (Kusá & al. 2008a). The previous benefit system was changed in the 2003 Act on social assistance by removing the distinction between subjective and objective reasons for material need and by introducing a differentiated system of benefit allocation calculated by household composition and supplemented by four types of allowances (health care allowance, activation allowance, housing allowance and protection allowance). Another important element of the reform was that the system became much more

decentralized. Three types of allowances (excluding the housing allowance) were allocated to the local authorities in the hope of being better targeted (UNDP 2006).

The Act on Employment Services introduced labour market activation programmes in 2004. The social welfare reforms already aimed at making benefits conditional upon participation in work, and activation programmes were to make the unemployed actively seek work, participate in educational programmes, in community, public and voluntary work. In the framework of the reform a new counselling system was established to help people in job search. In the past, participants of the public work programmes were entitled to social security and the time spent in this employment was taken into account in the accrual of pensions. With the newly introduced measures, this was changed.

Looking at the situation of income structure and welfare dependency before the reforms among the Roma population, it was found that the proportion of government transfers of the total household income was around 70%, i.e. highest among the five studied CEE countries in Slovakia in 2001 (Figure 1 by UNDP 2002).

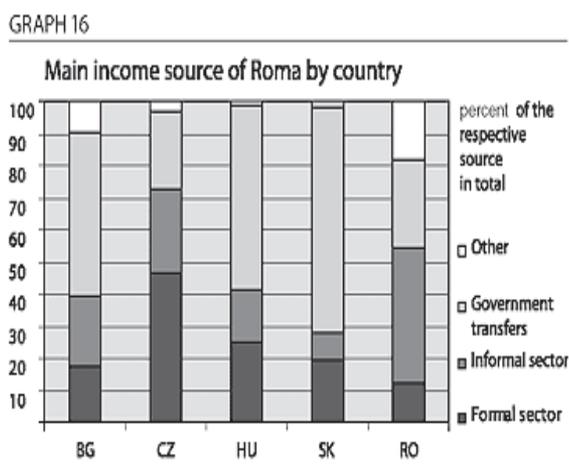


FIGURE 1. Main income source of Roma households in Bulgaria, Czech Republic, Hungary, Slovakia and Romania in 2001

(Source: UNDP 2002.)

Regarding the ratio of Roma families' depending on government transfers, Slovakia was again at the top: 44% of families could only maintain themselves because of the benefits they received from the government (UNDP 2002). A rather high proportion of Roma participated in public works in Slovakia as compared to the other four countries in the UNDP survey. For Slovakia the share was 25%, whereas for example in Bulgaria, it was 6%. – This was, on the one hand, due to the dominance of public work programmes as labour policy instruments in the country,

and on the other hand, to the fact that after six months of public work, people could be re-registered as unemployed and eligible for otherwise unobtainable benefits (UNDP 2002). Still this system traps the Roma and other socially marginalized groups in the vicious circle of public employment and social benefit, and it does not contribute to the actual intergration into the labour market and society in general.

The impacts of the 2002 and 2004 reforms were measured by the “disincentive” rates. This indicator shows to what extent it is worth taking up a job rather than receiving state benefit (closing the benefit trap). It was found that the share of persons in the benefit trap dropped by 88% in 2004. The cut of benefits decreased the number of recipients by 35% resulting in a budgetary saving of 2.5 billion Slovak crowns. It was also found that 69% of former social benefit recipients found employment. All in all, the major impact of the reforms was a significant reduction of the unemployment rate and welfare dependence. Nonetheless, the poverty rate of those who still depend on social welfare has increased, especially for families with children (Mészáros 2008).

The 2006 UNDP survey was to assess the impacts of the 2003-2004 social assistance and labour market reforms on the Roma population. Altogether 73% of the Roma households in the sample were receiving some kind of benefits, against only 23% of the non-Roma in the neighbouring areas. Concerning the proportion of the take-up of the various allowances, 35% of Roma social assistance recipients and 26% of all Roma households received a health care allowance. As to activation allowance the rates were 66% and 48% correspondingly. The housing allowance was received only by 16% of the benefit recipients and by the scholarship recipients in 6% of the cases. The difference between Roma and non-Roma regarding the take-up rate of allowances was not significantly different. The figures indicate that the dependence of the Roma population on social welfare benefits had not changed, and it remains on the same level as before the reforms, whereas the supplementary allowances reach the Roma to the same degree as the non-Roma population.

The same survey also evaluated the extent to which the Roma participated in the active labour market programmes and assessed whether they were able to achieve their original goal which is to enable the unemployed to find work on the primary labour market. It was discovered that 63% of the Roma had not been involved in the activation programmes at all. Interestingly, the rate among the non-Roma population was even smaller, they participated about three times less frequently than the Roma in the activation programmes. Table 2 shows the share of Roma participation in activation programmes by the settlement type.

The participants of the activation programmes were asked if they felt more motivated to seek employment after having participated in the programme. The answers were rather positive, since 50% said yes. Another question was whether the programmes improved their chances to find a job and the majority, 59%, said no. With respect to the possible impact of the activation programme on social integration, it was found that almost all participants worked near their residence.

Thus, the chances for establishing social contacts outside of one's community were extremely limited and as a consequence the chance to get a job – irrespective of the willingness - did not increase significantly. One has to add that although there are no data collected about employers' discrimination practices it is pretty obvious that Roma face significant racial discrimination when applying for an open position.

TABLE 2. Share of the Roma in activation programmes by length and settlement type (%)

Period	Segregated	Separated	Mixed	Total
Total (if ever)	41.4	31.7	38.5	37.2
In previous months	32.9	21.7	30.1	28.3
Difference	8.5	10.0	8.4	8.9

Note: The question was asked for all household members over the age of 18.

(Source: UNDP 2006.)

Besides its low effectiveness, there are some important controversial elements of the activation programmes that should be pointed out. Employers (local governments, villages or companies) simply used activation work to reduce their expenses. Moreover, from the respondents' answers it could be assumed that in many cases there was actually not enough work to involve everybody who was willing to participate. In other words, it is decided by local officials and mayors what jobs will be offered to whom. Taking into consideration the unemployment and dependency rates of the Roma population in Slovakia, it can be concluded that the activation programmes (and the corresponding reforms in general) have not had a positive effect on this part of the population. Moreover, the poverty rate of those dependent on social benefits is still considerable, which mainly affects the Roma.

## 7 ROMA BETWEEN LABOUR MARKET AND WELFARE IN ROMANIA

ZSUZSANNA VIDRA

### Research on the Roma population and basic demographic data

The census data (from 1992 and 2002) containing ethnic affiliation figures based on self-declaration are used for the analysis very of Roma situation with a reservation. Given the unreliability of the ethnic figures of the census, the Research Institute for Quality of Life (Zamfir & Zamfir) carried out representative surveys in 1992 and 1998 to have more precise data on the Romanian Roma population. As one of the basic methodological concerns, the sampling was not exclusively based on self-identification but also on identification by external sources such as interviewers.

The UNDP has undertaken several research projects with the aim of exploring and comparing the socio-economic situation of the Roma populations in the CEE (Central and Eastern Europe) and the Balkan countries, especially as nationally produced data are often missing. Romania was included in several of the UNDP projects, e.g. “The Roma in Central and Eastern Europe: Avoiding the Dependency Trap” (2002); “Faces of Poverty, Faces of Hope” (2005); “At Risk: Roma and the Displaced in Southeast Europe” (2006). The projects used both survey methods based on a representative sample as well as incorporated existing national statistics. The World Bank also carried out important research projects on the issue. “Roma and the Transition in Central and Eastern Europe”, published in 2000, was the first cross-country report on the poverty and human development challenges that Roma face in Central and Eastern Europe. The report entitled “Roma in an Expanding Europe: Breaking the Poverty Cycle” (2005) was based on survey data and case studies.

The most recent project, “Inclusion and Exclusion of Roma in Present-Day Romanian Society” (2008), was developed as the research component of the Phare programme titled “Strengthening Capacity and Partnership Building to Improve Roma Condition and Perception”. The research contained both quantitative and qualitative data collection and analysis with the aim of producing comparable socio-economic data on the Roma and the non-Roma populations living in their proximity. The study, which was carried out for policy-making purposes, described mechanisms of social exclusion. The project combined three different methodologies: a representative survey with a Roma and a non-Roma sub-sample, 36 community studies and a survey on local authorities.

As indicated above, census data on ethnicity, especially of the most marginalized groups, are very unreliable as to the actual size of the given ethnic population. A detailed description of the causes of the unreliability of data – i.e. unreliability of external identification, self identification (Roma usually a second ethnic identity) and situational nature of ethnic identification – is provided by Ladányi-Szelényi (2002) in their cross-country comparative Roma survey and by Fleck & al. (2008). As to the census data, which considerably underestimate the number of Roma in all CEE countries 401,000 people declared themselves Roma, representing 1.7% of the total population in the first census after the collapse of the state-socialist area was held in 1992. During the next census in 2002, the number of self-declared Roma had grown to 535,000 (2.4% of the total population). In 1992, the Research Institute for Quality of Life set out to provide an expert estimation of the size of the Roma population. According to the results of their survey the number of Roma was around 1 million, i.e. 5% of the total population in the early 1990s in Romania (Magyari & al. 2008a). Besides surveys, there were estimates as well, such as that of Bárány (2002) who calculated that around 1.5 million Roma lived in the country (7%). The Roma Education Fund in 2005 assessed that between 1.5–2 million of Romanians were of Roma origin. All studies and documents point out that Romania has the largest Roma minority group in Europe.

### Basic demographic characteristics: birth rate, age structure, family structure

However we define the ‘Roma’ all essential demographic data are very different for the Roma when compared to the non-Roma population. The fertility rate among Roma (2.6) was significantly higher than in the total population (1.8) according to the 1992 census. According to the findings of the Reproduction Health Survey conducted nine years later, in 2001, the Roma reproduction rate had not changed compared to the previous periods, while the rate has dropped among Romanians (1.2) and the ethnic Hungarians (1.3) (UNDP 2002). Thus, the age structure of the Roma population is tilted towards the youngest age cohorts (UNDP 2002). Life expectancy, and consequently the ratio of elderly are also significantly lower among Roma than the entire population. For every member of a Roma household between 30 and 59 years old, there are only 0.2 elderly people, compared to 0.5 in the non-Roma households (Strategic National Report 2008). Family size is also larger among Roma compared to the total population: 3.1 for the total population (census 1992) and 6.7 among Roma (data by the Research Institute for Quality of Life 1992).

Marriage patterns are significantly different as well between Roma and non-Roma in Romania. First of all, around 40% of the Roma are not married legally and this phenomenon is more frequent among the younger generations: only half

of the families under the age of 24 are legally married. When married, the age of wedlock is much lower than in the general population: 35% of Roma women married at the age of 16, 17% at the age of 17–19 and 26% between 19 and 22, while in the total population the marrying age 22.25 years according to the 1992 census. Concerning family planning, by the findings of the Research Institute for Quality of Life, the share of those using contraception was four times lower among the Roma than in the general population (UNDP 2002).

## Educational level

The level of education of the Roma population in Romania is significantly lower than that of the majority population. A very important factor in adequate school attainment is early socialization that starts with kindergarten attendance. The Phare survey indicated that 52% of Roma children attended kindergarten as opposed to 76% of the total number of children. It was found by that 27% of Roma boys and 35% of girls do not complete primary school (UNDP 2002), and in contrast to 33% of non-Roma 66% of Roma had only primary level education or less (World Bank 2005). Regarding further educational attainment data, the 2008 Phare survey found that only 9% of Roma aged between 18 and 30 years of age had completed secondary school as opposed to 41% in the total population, and only 2% of Roma had a university degree against 27% of the general population (Strategic National Report 2008). To a lower extent than in other CEE countries, but still quite frequently Roma children are channelled to special schools in Romania (UNDP 2002; cf. the article on Slovakia). Their socialization disadvantages due to socially unprivileged or linguistically different environments are regarded as mental handicaps and they are placed in schools for those with intellectual disabilities. It was found that 2.5% of the Roma and 1.7% of the children of the total population attended such schools in Romania (Phare 2008). The difference is rather small in towns and villages but fairly large in large cities where 2% of the total and 10% of the Roma pupils are enrolled in special schools. The difference may be explained also by structural reasons, namely, that special schools are typically available in large cities. The generally low educational attainment level, and the high proportion of those, who have not completed elementary education makes the Roma extremely vulnerable on the labour market, where according to legal requirements, a completed primary school education is the minimum prerequisite to applying for jobs as well as to participating in labour market training programs (OSI 2006).

Another general problem related to quality of the education of Roma, also prevalent in other of CEE countries, is significant ethnic and social segregation in the school system. According to results of the Phare survey 25% of Roma children attend segregated classrooms and less than half (47%) of the school-aged Roma children go to fully non-segregated classrooms in Romania. There is, however

a special problem characteristic only for Romania that further complicates the situation, namely the lack of birth certificates and identity cards for important segments of the Roma population. Without these documents, children drop out of the official registration systems, and in practice may be completely excluded from education. Despite government efforts to provide all citizens with proper documents there is still a good number of undocumented people, most of whom are Roma living in socially and geographically marginalized and segregated locations such as favela-like settlements in the proximity of waste dumps. Many of those living among such circumstances are children, who never go to school, or if they do, drop out after a few years of unsuccessful education (Magyari 2010). The 2003 National Democratic Institute estimated that one fifth of the Roma population did not have identity cards (UNDP 2005) whereas in the more recent research (Phare 2008) it was found that only 2% did not have this document (mainly in large cities where it amounted to 4%).

In Romania a great number of Roma are illiterate (Phare 2008): 22% of Roma as opposed to 2% in the total population. Naturally the proportion is strongly correlated to the number of years spent in education: 7% of Roma people over 14 who graduated from primary school were actually illiterate and 28% of those who attended school but dropped out halfway could neither read nor write, while 88% of those who never went to school were illiterate.

## Geographical distribution/spatial segregation/housing conditions

According to the figures of the Roma Inclusion Barometer (2007), the majority of Roma live in rural areas (60%), and the remaining 40% lives in urban environments, mainly in old, dilapidated houses in city centres, or suburban deprived settlements (Magyari & al. 2008a).

A typology of Roma settlements was elaborated on the basis of a country-level survey conducted by the National Agency for Roma (Sandu 2005). In the framework of the research 848 Roma communities comprising of about 250,000 inhabitants were studied: 59% of them, were classified as poor. A further important piece of information was that 75% of the poor Roma communities were located adjacent to cities or small towns (Zaman & Stănculescu 2007).

The 2005 UNDP study indicated that as opposed to 4% of the total population 29% of the Roma did not have access to secure housing. Concerning the housing space, the Phare survey found that it was over twice better among non-Roma households than Roma ones. Poor housing infrastructure was disproportionately frequent among Roma households: in contrast to 2% nationally, 15% of Roma households had no electricity. As opposed to the national average of 9%, 36% of Roma households did not have access to running water.

In the Phare research some dimensions of spatial segregation were measured by using four different indicators referring to ethnic and economic segregation. The study assessed the influence of segregation on various aspects of life. The study demonstrated how much living conditions differed and what affect they had on everyday life: 29% of the households in unkempt neighborhoods (“unkempt” meaning ethnic and economic segregation at neighbourhood level) did not have access to electricity whereas for households in other district- and neighborhood types this share was only 7%. The study revealed that residential segregation influenced educational segregation as well. Children living in such communities were more likely to study in ethnically homogeneous, segregated Roma only classrooms.

## Social situation i.e. poverty of the Roma

Several studies deal with the living conditions and poverty of the Roma population in Romania. The 1992 “Socio-economic life conditions of the Roma population” survey undertaken by the Institute of Quality of Life found that about 41% of the Roma respondents could not provide for their basic needs. The study was repeated six years later and it proved that the situation had deteriorated. In 1998, 68% of the Roma said that they did not have the necessary means to maintain themselves (Magyari & al. 2008a).

Another survey – the Ethnic Relations Barometer 2002 (Magyari & al. 2008a) – showed the difference of the poverty rate of the Roma population compared to other ethnic groups in the country. Altogether 52% of Roma lived under the severe poverty rate (approximately 30 euros per month) as opposed to 9% of the Romanians and 6% of the Hungarians (Magyari & al. 2008a).

The 2007 World Bank report indicated an important decrease of absolute poverty in Romania between 2000 and 2006: it dropped from 36% to 14%. The decline was a result of the rapid annual economic growth (5–6%) the country went through in this period, which benefited all population groups. Very importantly, the inequality level, which was comparable to EU-25 and EU-15 levels, and lower than e.g. in Poland, Estonia, Lithuania and the UK did not grow significantly during this process. Nonetheless, deep “pockets of poverty” had not disappeared, multiple deprivation in rural areas and certain geographical regions especially in the North-East of the country was found. Some social groups as well as the Roma population remained the most vulnerable in terms of living conditions, access to services and chances of mobility. Although the poverty rate of the Roma decreased from 76% in 2003 to 58% in 2006, their relative risk of poverty increased. It was 3 times higher than the national average in 2003 but 4 times higher than that in 2006.

## Labour market situation of Roma

The unemployment rate after the economic and political changes in Romania grew to 11% in 1994 and increased further to 12% in 1999. It was the result of the restructuring measures introduced when large state-owned non-profitable, so called ‘socialist’ industries and companies were closed and employees dismissed. Unemployment rate dropped in 2000 and has remained since then around 7–8% (Zaman & Stănculescu 2007). Due to the generally low level of education and unfavourable geographical distribution of Roma in those regions, where economic depression is more salient, unemployment among Roma is significantly higher, than among non-Roma. It was first assessed in 1992 in the framework of the “Socio-economic life conditions of the Roma population” survey. This study revealed that 51% of the Roma did not have a job at that time (Magyari & al. 2008a). According to the ILO broad definition of unemployment<sup>4</sup>, 44% of the Roma were unemployed in 2005. As to the gender division, 38% of Roma men and 52% of Roma women were unemployed. When respondents were asked whether they considered themselves unemployed, the rate was 78% for the Roma and 25% for the non-Roma population. Hence, there is a significant difference between the employment rate of the minority and the majority population.

In addition to data on the labour market situation of Roma another indicative piece of information is the type of economic activity typical for this segment of the society. The Phare study distinguished “regular work”, “casual work”, “housework” (e.g. helping in families), “student” and “do not work” categories for the age group of 18–59. The survey showed traits of exclusion of Roma from the official and regular labour market and their squeezing out towards irregular and unofficial labour: about half of the non-Roma (51%) had regular work as opposed to 22% in the Roma sample. Few i.e. only 5% of the non-Roma had casual work, in contrast to 18% of the Roma. Despite the significantly lower age structure typical for the Roma (see the section on demography) the rate of students among Roma was significantly lower than for non-Roma: 7% of the non-Roma and only 2.6% of the Roma were students. Interestingly, the unemployed (“do not work”) category was closer in the two groups than in the macro-data: altogether 24% of the non-Roma respondents said they did not work, and only somewhat more, 37% of the Roma, responded in the same way. This could be a result of the fact that the survey measured economic activity that is much broader a term than employment, and Roma considered themselves as working, even if such work was unreported or irregular. The results show that if the two income-generating activities are considered (“regular work” and “casual work”), the difference of the rates of economic activity between the Roma and non-Roma population is significantly lower (40% and 56%).

Related to the type of activity dimension, another important piece of information concerns is the involvement in the informal economy. The 2002 UNDP survey indicated that 70% of Roma involved in income generation activities

worked in the informal sector of the economy. It was also found that activity in the informal economy was about four times higher among the Roma than among the non-Roma population (UNDP 2006).

It is an important indicator of labour market status in which sectors the Roma are employed. As the Table 1 shows the majority work in agriculture and 31% are unqualified workers (Zaman & Stănculescu 2007). By the Phare survey results, the findings reflect the results of earlier studies. One third of the economically active Roma work in agriculture i.e. Roma work in agriculture about three times more often than the non-Roma, and Roma are also somewhat overrepresented in construction but seriously underrepresented in all other sectors (Table 1).

TABLE 1. Distribution of economic sectors by ethnicity (Roma vs. non-Roma, respondents aged 18–59, %)

	Roma	Non-Roma
Education, science, health, culture	1.8	9.9
Transport	3.7	8.8
Other	6.3	7.5
Industry, mining	7.3	10.5
Trade	11.5	13.9
Construction	18.8	11.4
Services	18.1	24.7
Agriculture, forestry	32.4	13.4
Total	100.0	100.0

(Source: Phare 2008.)

## Migration and Roma

In the early 1990s, large numbers of Germans left the country. The subsequent years saw an exodus of illegal migrants looking for work opportunities in developed countries, and according to the estimates, twice as many Romanians worked in Western Europe in 1999 than in 1992. The 2002 introduction of the Schengen visa has further reinforced migration trends. Data concerning migration are very difficult to retrieve and they are not very trustworthy given the high proportion of illegal emigrants from Romania. It was, however, deduced from census data that about 600,000 people had left the country between 1992 and 2002. There are other estimates, too; one is that by International Organization for Migration in 2003, which approximated the number of Romanian working abroad to be around 1.7 million, while this number went up to 2 million by 2006 (Zaman & Stănculescu 2007).

As mentioned above the data on migration are to a large extent based on estimations and, thus, unreliable to certain extent. It is even more difficult to obtain similar data for the Roma population. Nonetheless, the Phare survey included questions<sup>5</sup> on migration and thus it provides some figures as to what extent the Roma partake in this process. According to this research, combined emigration potential (covering all kinds of intentions to work abroad) of Roma was higher than that of the non-Roma: 31% for the Roma, and 18% for the non-Roma. The net migration potential, which included only those respondents who would indicate a date of their forthcoming emigration was lower for both Roma (21%) and non-Roma (11%) but the relative difference by ethnic group was about the same. The propensity to emigrate was higher among the Roma than non-Roma by the indicators used, but the actual chance to work abroad in near future was lower among Roma.

Phare Project also studied to what extent migration improved the financial situation of Roma and non-Roma households (see Table 2.).

TABLE 2. Development of household's financial situation, by migration experience of household members and by ethnicity (%)

Ethnicity	Financial situation		
	Better	Same	Worse
Roma			
Total	13.8	38.4	47.8
With migration experience	33.1	21.3	15.6
Correlation index	2.4	0.6	0.3
Non-roma			
Total	17.8	52.9	29.3
With migration experience	29.2	18.1	18.6
Correlation index	1.6	0.3	0.6

(Source: Phare 2008.)

The data show that working abroad improved the financial situation of Roma households more than that of non-Roma households. In Roma households it was 2.4 times more likely that the situation got better than in non-Roma households, where it was only 1.6.

## Policies relevant for Roma

As an introduction to this section, one has to shortly present the key changes that the social protection system and the labour market have undergone in the last two decades, and then describe, how these changes and policies affected the Roma population.

Social protection schemes, which cover pensions, healthcare services, unemployment insurance, as well as family and child allowances, were very fragmented, ineffective and insufficient during the early 1990s. This was partly due to the fact that the population's contribution to the central budget was extremely low, given the fact that about one third of the total income in the country was in kind at that time and only about half of the population paid for social insurance. Meanwhile, the income level was among the lowest in Europe indicating major problems caused by poverty (World Bank Labour, Employment and Social Policies 2002). About 30% of all employed people in Romania were paid at the minimum wage level (Zaman & Stănculescu 2007).

The first significant reform of the social protection system was introduced in 1995 with two major elements. One was decentralizing social protection system and allocating important responsibilities to local authorities. The other one was establishing a system of minimum guaranteed income (MGI). Decentralization in the short run caused serious problems in social protection, due to shrinking financial resources and the inefficient cooperation between the central and local authorities and as a result of this both social and regional inequalities increased significantly.

The minimum wage, which had been 65% of the average wage in 1989 gradually declined until 1999, when it represented no more than 27% of the average wage. The system collapsed in 2000, and was followed by a reform in 2002, which clarified responsibilities and benchmarked MGI is at 36% of the minimum gross wage (Zaman & Stănculescu 2007). Several other allowances and services – i.e. medical insurance, emergency allowance and household heating allowance – became conditioned: MGI applicants have to perform an 'activity of public interest' if they wish to get entitled (Strategic National Report 2008).

As to labour market policies, it was in 1991 when the first labour market reform took place with the establishment of an unemployment fund to which employers and employees had to contribute on an obligatory basis and the self-employed on a voluntary basis (Zaman & Stănculescu 2007). There are some major problems related to labour market policies in Romania. One of them is the high rate of payroll tax: in 2005, they represented 47.5% of the gross salary, which pushes large numbers of people – over 20% according to latest estimates – into the informal economy, a process affecting population with a low education and Roma disproportionately. The National Institute for Labour Research and Social Protection calculated that about 1.2 million people (approximately 11% of the total labour force) were employed in the informal sector. The government has tried to address the situation with little success by creating the institution of labour inspection as well as by providing sets of incentives for employers to create new jobs in the formal sector (Zaman & Stănculescu 2007). In 1997, with the largest wave of dismissal of workers from non-profitable state enterprises, the government introduced the National Programme for Active Labour Market Policies (ALMP)

aiming to reintegrate unemployed workers by subsidies for geographical mobility, starting small businesses or enrolling in training programmes (Zaman & Stănculescu 2007).

### *Impacts of social assistance and labour market policies on Roma*

Since there are no studies that directly deal with the issue of the impact of these policies on the Roma population in Romania, the impact must be estimated by other source. After the introduction of the minimum guaranteed income (MGI) and new social protection measures, their impact on the reduction of poverty in general was analysed. As regards to the MGI, it was found in 2004 that it had a positive effect on severe poverty but it was still not well targeted, meaning that the poorest were not well reached. Concerning the social protection and social assistance transfers, it was discovered that the most positively affected group was the elderly aged above 65. Among all social transfers, child allowances proved to have the highest positive impact on reducing poverty by reaching the widest range of the poorest families (Zaman & Stănculescu 2007). Here we had to add again, that most probably, those Roma families, who lived in total social exclusion; i.e. without official documents, were completely ousted from the social protection system, as well.

Labour market measures, even if not targeted at Roma, might bear a major impact on their labour market situation. Still the lack of specific data, or information, on how this group has been affected by labour market measures, restrains us to provide any conclusion here. Some ethnically targeted labour market programmes have been introduced as well, with the aim of helping the Roma to enter the primary labour market. No overview or research on the effectiveness of these programs are available, thus we may only provide some examples here. A special programme offered 9,845 jobs to Roma people in 2004 (Zaman & Stănculescu 2007). More recently, the Strategic National Report Regarding Social Protection and Social Inclusion (2008) mentioned that in the framework of a special programme 15,987 Roma persons have been employed. Given the low number of jobs offered within such frameworks and the lack of impact assessment the effect of these programmes on the employment situation of the Roma in general is probably very small.

Another important phenomenon related to the impact of policies on the living conditions of Roma should still be highlighted. In the 2002 UNDP survey, it was found that a somewhat more than 10% of the Roma had an income from the formal sector, around 40% had an income from the informal sector, and about 25% lived mainly on government transfers. The 2008 Phare survey showed a gradual change in the composition of the income sources: 43% of income came now from government transfers (social benefits, MGI), and 23% from informal activities. It is not obvious how this very interesting result should be interpreted.

As pointed out before, the poverty rate of the Romanian population as a whole has declined as well as that of the Roma population. However, social policies have

not prevented the inequalities from increasing and now Romanian Roma are poorer in relative terms than before. This means that social disparities are growing, most probably also inside the Roma population. The labour market situation of Roma has not changed significantly; neither unemployment nor employment rates have improved. The general picture reinforces the impression that government policies are inadequate to compensate for the low status and poor living conditions of the Roma. This most probably influences Roma interest in emigration, which is higher than the non-Roma one.

## 8 SUGGESTIONS FOR FURTHER RESEARCH ON IMMIGRATION AND IMMIGRANT POLICY

HANS-PETER VAN DEN BROEK, VERA MESSING, SIMO MANNILA

The degree of participation of immigrants and ethnic minorities in the European labour markets and welfare regimes varies widely among different EU member States. While some, in particular Southern European countries are experiencing major inflows of migrants, putting great pressure on their labour markets and welfare systems, other, for instance Nordic countries are facing opposite demographic challenges like population stagnation and aging, which higher immigration rates might help to solve. And whereas some countries may be characterized by a high degree of turnover in population – large numbers of workers are emigrating, while at the same time immigrants, occupy the jobs they leave behind – other if any, countries are less affected by immigration, instead they have high shares of ethnic minorities, whose problematic integration challenges social cohesion. These divergent phenomena generate a wide range of academic and popular debates and research in the EU Member States and give rise to a spectrum of different labour market and welfare policies aimed at immigrant and ethnic minorities.

With the free mobility of the European workforce it is possible that the all-European labour market will become uniformly segmented, as has already been described by theorists of primary and secondary labour markets, while national borders and policies lose importance. It is possible that knowledge immigrants will constitute a new European segment of high-quality professionals, while the problems of those at risk of labour market marginality will principally remain at the level of national social policies.

Research shows that immigrants and ethnic minorities face a higher degree of labour market flexibility than native workforce. Thus, we may pose the following questions: what is the position of immigrants and ethnic minorities in terms of flexicurity? Does immigrant or ethnic minority status mean flexibility in the labour market without the corresponding security? We have addressed this issue to various degrees in the above articles, without finding a conclusive answer. It is not in the interests of the EU Member States to let labour market and social exclusion of immigrant and ethnic minorities grow.

In relation to this, we hypothesize that increasing flexibility in the labour market has a greater impact on family structures and gender relationships of immigrants and ethnic minorities than on those of native populations. What are the key problems of interaction between work and family among immigrants and ethnic minorities? Are they different or more pronounced than in the basic population? Why do so many immigrant women stay out of labour market? Do welfare state

solutions work equally on behalf of all immigrant and ethnic groups and what has been done for the most vulnerable groups? Family life and participation in paid work are strongly influenced by cultural factors.

Unemployment rates among immigrants and ethnic minorities tend to be higher than among native workers. However, for Spain this has not been true until the present financial crisis – why? Is there a different selection process into immigration to Spain than other countries or will the unemployment rate for immigrants in Spain rise in the coming years to the above-average level that is typical of other EU countries? Or does the Spanish labour market have specific characteristics that favour the incorporation of immigrant workers? Additional research would be here needed.

As a result of growing shares of immigrants in many EU countries, who predominantly occupy low-skilled industry and service jobs, with corresponding implications to their subsistence, do labour market policies in Europe tend to focus more on quantitative than on qualitative aspects of employment, for instance in the active labour market policies and other job creation? Is there a relation between the characteristics of labour market participation of immigrants (high flexibility, high rate of low-skilled jobs) and the incidence of working poor in society, and if yes, for which immigrant groups this is true? Can the situation of ethnic minorities be analyzed in similar terms, or should we already initially make a distinction between types of immigrants? Do the cohorts of immigrants and ethnic minorities increase among Europe's working poor? Hence, can we detect an 'ethnification' of the working poor phenomenon in the EU member States?

We see that special attention must be paid to jobs created by public funding, the quality of these jobs and their capacity to channel employees further into the open competitive labour market. Together with education and training, these jobs constitute an important means of integration for immigrants. The integration schemes of different member States of the EU should be comparatively studied in order to identify transferable good practices in these schemes. A special focus should be on the role of teaching the language and cultural skills of the host country: it has been stated that language skills are the key into the new society. The project work financed by the European Social Fund has already contributed to a certain extent to the consolidation and transfer of good practice across various European countries.

We would also wish to plead for more cultural studies of immigration and immigrant life in the context of European research programmes. Such issues as informal employment or working poor are not only relevant in relation to tax base or targeting social assistance: they may be based voluntary or involuntary choices, defining life chances not only to the persons and families in question but to generations. Immigrants' problems deserve multidisciplinary attention. For policy-making, it is useful to address labour market and social issues also in a

wider context: this is pointed out, for instance, in some of our articles describing the importance of regional policies for successful integration.

Labour mobility in the European Union and the immigration from non-EU countries will undoubtedly create a new tension: while labour markets become unified, cultural segmentation may prevail and even increase. Integration as the optimal goal of the acculturation process, in which both the host society and immigrant communities take part, is not an ideal everybody in society agrees with – people may also champion full assimilation of immigrants or the cultural segregation of native and migrant communities. These theoretical classifications bear wide practical implications.

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