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Migration, welfare states and the incorporation of migrants in different welfare regimes

Ann Morissens
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1. Introduction

Migration remains a much discussed and often contested topic, not only in Europe but also in the US, even if the nature of the discussion is different as a consequence of a different historical background and the policy choices with regard to migration. Europe is confronted with an ageing society, which is in some countries exacerbated by very low fertility rates. These demographic changes are a challenge for the existing social provisions, not in the least public spending for pensions and health care. In recent years, good economic results have contributed to lower unemployment rates in most of Europe. This combined with an ageing population, resulted in labour shortages in certain sectors. In their attempts to deal with these challenges, policy makers placed new forms of migration back on the political agenda. Whereas after the stop for labour migration in the 70s, most emphasis was on immigration policies and ways to halter flows of (unwanted) migrants, the debate has recently changed and several European countries are considering new (selective) economic migration to deal with labour shortages in certain segments of their labour markets. The demand for new migration is therefore an ambivalent choice seen the often negative (public) attitude toward migration and migrants that occurred in several European countries and the attempts to halter migration. Another point for reflection is the weak socio-economic position of many migrant groups. It seems that most countries were not successful in integrating guestworkers and their families in their societies. Most countries also realised that a laissez-faire approach does not facilitate integration or that integration comes spontaneously. This is reflected in the integration programmes that were set up in many countries. It remains to be seen whether they are helpful to close the gap between migrants and non-migrants in the labour market, educational systems, etc. This paper will address the socio-economic outcomes of both migrants and natives.

In a first part, the paper will examine the interplay between ethnic diversity and types of welfare states by initially considering the impact of ethnic diversity on welfare states and subsequently analyzing how ethnic minorities fare in welfare states representing different regime types. The selected countries are Belgium, France, Spain, Sweden, Switzerland and the U.S.

The paper consists of three parts. In considering the impact of ethnic diversity on welfare states, the first part of the paper will look at two distinct but nevertheless interrelated issues. The first issue is the influence of ethnic diversity on the development of welfare states. Already in the mid-1970s Harold Wilensky (1976) posited that ethnic heterogeneity slowed the growth of the welfare state. The second issue is whether ethnic diversity erodes welfare states. Both issues have received scholarly attention over the years and for both issues I will critically evaluate the evidence substantiating and refuting the hypotheses in the academic literature.

In a second part, the principal features of the migrant population and migrant policies in the selected countries will be briefly addressed and a clustering will be suggested based on findings from the welfare state and migration literature.

The third part of the paper will provide a comparative analysis looking at poverty among migrants and also examining to what extent ethnic minorities are incorporated into the systems of social provision in different regime types. For this exercise, data from the Luxembourg Income Study (LIS) is used. In this empirical analysis, it is not possible to devote much attention to spatial inequalities due to data availability, the sample of migrants in the dataset is for most of the selected countries too small to analyse at a regional level. Even this would be a superficial exercise since it cannot detect patterns of neighbourhood segregation. Nor will the analysis deal at any length with multiculturalism versus a color-blind orientation. The relationship between the welfare state, migration multiculturalism policies is discussed in the first part of the paper, whereas the third part deals with actual outcomes for migrants in different migration and welfare regimes.

2. Migration, ethnicity and the welfare state: the debate

The relationship between the welfare state and migration is a relationship that is often named but rarely examined or discussed in much detail. Somewhat surprisingly, the relationship did not occupy a central place in the welfare state development strand either. It is also a very complex relationship and different aspects of this relationship can be discussed and analysed. Nevertheless, the increasing interest for the impact of migration on the welfare state and its consequences, have recently triggered scholarly

and political attention (Banting and Kymlicka 2006; Myles and St-Arnaud 2006; Taylor-Gooby 2005; Van Oorschot 2008). The next section offers an overview of this debate and its main hypotheses.

2.1 Growing diversity and the welfare state

One issue that has received attention among both academic scholars and politicians is the influence of ethnic diversity, caused by increased migration, on the welfare state. Gary Freeman who was one of the scholars, to take up this topic, was rather skeptical about the outcomes for the welfare state; “from the perspective of the welfare state, there can be no doubt that migration has been little short of a disaster” (Freeman 1986: 61). Freeman’s main fear was that the introduction of a foreign workforce would cause a division between migrant and native workers and that this division would impose a threat to the solidarity within the working-class. This division could then affect the public support for the welfare state, which is generally seen as one of the prerequisites for its existence. If the public support for the welfare state should decrease, this would lead to a dismantling of the different welfare schemes and would result in what Freeman (1986: 61) calls “an Americanization of European social policies” Freeman’s hypothesis is very much inspired by the power resources strand, which considers a strong working-class united in unions as one of the main actors and driving forces behind the development, but also the conservation of the welfare state. Migration, as a result of the recruitment of foreign labour is seen as a factor that may break up solidarity and cohesion amongst the working class, which in turn may weaken public support for the welfare state and in the worst-case scenario, result in the dismantlement of the welfare state.

In recent years, Freeman’s assumption from 1986 became influential again. This is not surprising since migrants often face difficulties in the labour market, display low levels of educational achievement and are more likely to be dependent on transfer payments. The assumption that migration is a threat to the welfare state is also reflected in the arguments right-wing parties, that in order to safeguard the welfare state, migration should be limited and welfare provisions should preferably be reserved to natives. Media stories that portray migrants as welfare scroungers have to some extent contributed to the electoral successes of right-wing parties and affected public opinion in several European countries. But the negative discourse about the harmful influence of

migration on the welfare state and the welfare dependence of migrants has also entered the discourse of more moderate parties.

One only has to look at European countries' migration policies to see that they have become more and more restrictive in most countries. One indicator for this increasing restrictiveness is the more stringent eligibility criteria for naturalisation. Whereas, a decade ago some countries still offered the possibility to obtain citizenship in a relatively easy manner, access to citizenship is nowadays much more contested and more difficult to obtain. The applicant does not only have to fulfil the residence requirements, most countries also demand sufficient language skills, knowledge of the country's history and society and non-use of public benefits in the years prior to the demand. To halter family reunification, that still constitutes a very important channel of migration; criteria for reunification have become more stringent as well and the most extreme example in this regard is probably found in Denmark, where the attachment to the country 'tilknytningskrav' makes it sometimes even hard for Danish natives to bring a foreign spouse or to return to Denmark after a period abroad. The tilknytningskrav is a criterion for reunification; this means that a person or a couple who wants to reunify with family members or a foreign spouse has to demonstrate that their links to Denmark are stronger than those to another country¹. These examples of more stringent migration policies illustrate that migration and the permanent settlement of migrants have become more and more contested in recent years.

Most countries have realised that the laissez-faire approach both in terms of migration and migrant policies also contributed to the worrisome socio economic situation of many migrants. In many countries, one can hear a plea for more selective migration and most countries have also implemented integration programmes for newly arriving migrants. With these measures they hope to facilitate the integration of migrants. New migration flows are considered to be necessary to address the demographic challenges that many European countries face.

In the next section I will discuss in more detail the assumptions about the influence of ethnic diversity on the welfare state and whether there is hard evidence that supports the fear of the sceptical scholars.

¹ The attachment (tilknytning) requirement has put Danes who are married to foreigners and have been living abroad for many years in a vulnerable position as well and they have often found themselves in a situation of being unable to return to Denmark.

2.1. 1 Impact of migration/ethnic diversity on the welfare state

Even if the assumption that ethnic diversity is a threat for the welfare state became more influential in recent years, (hard) empirical evidence that supports this assumption is scarce and even when a positive correlation is found, it is seldom convincing enough.

Keith Banting (2000) is one of the scholars who explored the question whether or not ethnic heterogeneity, which is increased by the process of immigration, is real threat for the welfare state. Unlike the above mentioned pessimistic warning from Freeman, Banting is more optimistic and does not predict a gloom-and-doom scenario leading to the eradication of the welfare state.

According to him, political institutions and their functioning are a more determinant factor for the development and survival of the welfare state than ethnic homogeneity. Reviewing previous research on the topic, he only found little evidence for a possible negative impact of ethnic heterogeneity on the welfare state. John Stephens, among the first to explore the topic (1979), did indeed find a negative correlation between ethnic and linguistic diversity and the strength of labour unions in countries that are characterized by ethnic heterogeneity. As a consequence of the weak(ened) unions, it may be more difficult to establish a welfare state. The negative correlation is an indirect correlation between ethnicity and the welfare state, since labour union power is one of the explanatory variables that influences welfare state development. However, Banting counter-argues this evidence referring to Belgium and Canada. These are countries in which ethnic and linguistic heterogeneity has not prevented the prevalence of an extensive welfare state².

On the other hand, the Scandinavian countries, famous for their welfare generosity and universalism were (still) countries with a very homogeneous population and culture at the time their welfare states matured. This may be seen as an argument that homogeneity has a beneficial influence on welfare state development but of course it does not entirely proof that the presence of heterogeneity is a threat to the welfare state or that homogeneity is a necessary condition for welfare states to develop.

In later work, Kymlicka and Banting (2006) surveyed the literature, looking for evidence to support the assumption that ethnic diversity is an inevitable threat for the

² One has nevertheless to bear in mind that the (linguistic) heterogeneity in Belgium and Canada is different from heterogeneity caused by migration and that a comparison with countries that display a high level of heterogeneity caused by a high share of foreign born among their population is not entirely valid.

welfare state. They distinguish two hypotheses about the linkage between ethnic diversity and the welfare state. A first assumption is the heterogeneity/ redistribution trade-off. This hypothesis suggests that ethnic diversity is likely to have an eroding effect on public spending and consequently may have a dismantling effect on the welfare state. Put differently: Countries with a high proportion of foreign born among their population will have difficulties to build or sustain an extensive welfare state.

If this assumption is correct, countries that experience a growth of their foreign born population should or will at some point be confronted with an eradication of their welfare states.

Turning to the countries that figure in this paper, most of them already have a significant share of foreign-born population (see table 1) and this number is still increasing as a consequence of family reunion and migrants' higher fertility rates. If the heterogeneity/redistribution claim is correct, the welfare state in these countries may be at serious risk.

Table 1: Share of foreign born population in selected countries (%)

Belgium	12.1
France	8.1
Spain	5.1
Switzerland	23.8
Sweden	12.4
United States	12.9

Source: OECD (2007), International Migration Outlook

The second assumption is the recognition –redistribution trade off. Here, Kymlicka and

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