

**SOCIAL CITIZENSHIP OF POLISH MIGRANTS IN LONDON:
ENGAGEMENT AND NON-ENGAGEMENT
WITH THE BRITISH WELFARE STATE**

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Declaration

I, Dorota Osipovič, confirm that the work presented in this thesis is my own. Where information has been derived from other sources, I confirm that this has been indicated in the thesis.

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Abstract

This thesis offers an account of how social citizenship is understood and actualised by ordinary citizens engaged in international mobility. It is based on an analysis of in-depth interviews with 62 Polish migrants conducted within their family and/or household context in London in 2007/2008. The interviews explored how participants satisfied their welfare needs in areas of housing, health and securing an adequate standard of living during their stay in Britain, and to what extent the satisfaction of those needs took place via welfare state or alternative institutions.

The eligibility constraints of EU and UK policies on the social entitlements of Polish migrants are reflected in statistical data such as the UK Labour Force Survey. Nevertheless the interviews show that engagement and non-engagement with the British welfare state depend considerably on the participants' perceptions of their position in British society. The needs, desert and membership logics of engagement and the market, care and indeterminate logics of non-engagement have been identified. For instance, the self-image of a contributing citizen with a strong work ethic underpins the desert-based logic of engagement. In contrast, the self-image of a pure migrant worker attains to the market-based logic of non-engagement.

Furthermore this thesis explains interactions that arise in the processes of engagement and non-engagement with London-based welfare state institutions and traces the consequences for the agent. Methodologically, the study follows the principles of the constructivist reworking of grounded theory. The emerging theoretical perspective emplaces agency in the tension between the ideational and actual levels of individualised experience of social reality, and suggests a sequential interplay between structure and agency. By relaying migrants' views and practices of social citizenship, the research identifies the non-national foci of solidarity and legitimacy rooted in the norms of conditionality and local citizenship which redefine the boundaries of modern welfare communities.

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Abbreviations

A&E	Accident & Emergency Departments
A10	EU member states which joined EU on 1st of May 2004 (Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia) and on 1st of January 2007 (Bulgaria and Romania)
A8	see EU8
C&LG	Communities and Local Government department
CB	Child Benefit, non-contributory, non-means-tested benefit administered by HM Revenue & Customs
CIS	Construction Industry Scheme
CORE	COntinuous REcording System for social housing lettings and sales in England
CPAG	Child Poverty Action Group
CTB	Council Tax Benefit, non-contributory, means tested benefit administered by Local Authorities
CTC	Child Tax Credit, non-contributory, means tested benefit administered by HM Revenue & Customs
DWP	Department for Work and Pensions
EC	European Community
ECJ	European Court of Justice
EHIC	European Health Insurance Card
EU	European Union
EU16	'old' EU member states (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden) excluding the UK and 'new' EU member states which joined on 1st of May 2004 (Cyprus and Malta)
EU2	'new' EU member states which joined on 1st of January 2007 (Bulgaria and Romania)
EU7	'new' EU member states which joined EU on 1st of May 2004 (Czech Republic, Estonia, Hungary, Latvia, Lithuania, Slovakia, Slovenia) excluding Poland
EU8	'new' EU member states which joined EU on 1st of May 2004 (Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia)
GP	General Practitioner
GT	Grounded Theory
HB	Housing Benefit, non-contributory, means tested benefit administered by Local Authorities
HM R&C	HM Revenue & Customs
HO	Home Office
IB	Incapacity Benefit, contributory, non-means-tested benefit administered by Jobcentre Plus; from October 2008 IB paid on health grounds has been replaced by Employment and Support Allowance
IS	Income Support, non-contributory, means-tested benefit administered by Jobcentre Plus, from October 2008 IS paid on health grounds has been replaced by Employment and Support Allowance
JSA	Jobseeker's Allowance, non-contributory, means-tested (income-based) or contributory, non-means-tested (contribution-based) benefit administered by Jobcentre Plus
LFS	Labour Force Survey
NFZ	Narodowy Fundusz Zdrowia, Polish 'National Health Fund'
NGO	Non-governmental organisation
NHS	National Health Service
NINo	National Insurance number
ONS	Office for National Statistics
PC	Pension Credit, non-contributory, means-tested benefit administered by the Pension Service
POSK	Polski Ośrodek Społeczno-Kulturalny w Londynie, Polish Social and Cultural Association
UK	United Kingdom
WRS	Worker Registration Scheme
WTC	Working Tax Credit, non-contributory, means tested benefit administered by HM Revenue & Customs
ZUS	Zakład Ubezpieczeń Społecznych, Polish 'Social Insurance Institution'

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Chapter 1. Introduction: migrant-citizen-agent

Citizenship is the bedrock for setting the rules of living together in a democratic society. Yet despite, or perhaps because of, being so crucial to the constitution of modern societies the definition of citizenship remains contested. Many academic and policy debates on citizenship run into “the problem of inclusion” (Dahl 1989: 119), questioning the competences and prerogatives of various social groups such as immigrants, women, ethnic and sexual minorities, young and senior, ill and disabled persons to full-fledged citizenship. Furthermore the boundaries of citizenship are both emphasised and endangered by the need to defend the liberties of citizens from the incursions of those set to abuse them by violent means ranging from common crime to sophisticated terrorism.

Citizenship is a complex phenomenon. Isin and Wood (1999: 4) conceptualise it as embracing “both a set of practices (cultural, symbolic and economic) and a bundle of rights and duties (civil, political and social)”. This definition alerts us that “citizenship is, willy-nilly, both a normative and an empirical concept” (Somers 2008: 23). There is no escape from the fact that the norms of citizenship are discernible only when they are enacted in practice and that citizenship practices are influenced by the norms which remain in place. Somers (2008: 23) argues that it is important to recognise “the causal force of normative commitments” on social actions alongside “sociology’s more traditional causal suspects, such as the economy, the state, the class structure”. Yet the precise relationship linking the normative and empirical levels of social reality remains a subject of long philosophical debate (e.g. Archer 1998; Dawe 1978).

As far as the normative dimension of citizenship is concerned the works of Thomas Humphrey Marshall (1950; 1981) instigated the bulk of contemporary scholarship into modern citizenship. In the Marshallian framework social rights play an essential role in paving the way to full citizenship in practice by guaranteeing a decent standard of living and welfare to all citizens regardless of their market value. Yet social citizenship is a costly endeavour and requires a popular legitimacy. The latter brings us back to the problem of inclusion and controversies surrounding the enjoyment of social rights by those who are perceived as not belonging to a particular community. Arguably, nowadays immigrants constitute a group in relation to which such controversies are at their greatest.

Economic migrants aim to better their wellbeing by participating in a host country's labour market. Despite being particularly prone to bear the brunt of market deficiencies by experiencing unemployment and low pay, immigrants often face restrictions in accessing the safety nets of social protection available to formal citizens. One can argue that immigrants' situatedness vis-à-vis the welfare project of the host society is disconcerting not only because of their conspicuously substandard social citizenship status, but also because it touches upon some of the weakest points in the contract between a nation-state and its own formal citizens by exposing the scarcity of public resources, omnipresence of market principles, broken promises and unfulfilled aspirations (e.g. Dench et al. 2006).

Although there is widespread agreement that citizenship emerges somewhere at the intersection of legal definitions and sociological concepts and that often certain practices emerge first and are subsequently incorporated into the body of law (Isin and Wood 1999), scholars of citizenship rarely venture into studying the practices, views and perceptions of ordinary citizens, even more seldom of citizens-migrants. The latter has been recognised as one of the biggest knowledge gaps in citizenship and migration studies. For instance Bauböck (2006: 31) argues for the need to study "citizenship practices among migrant populations" utilising both qualitative and quantitative research methods. Miller (2003: 18) observes that there is a dearth of comparative research into the normative and enacted understanding of social justice by culturally diverse groups living in the same political community. Van Deth (2007: 407) notes that given the long history of academic debates about citizenship, the scarcity of empirical research into the normative aspects of citizenship endorsed by ordinary citizens, such as the image of a good citizen, is somewhat bewildering.

Overall, despite the proliferation of literature on citizenship and immigration, only a handful of studies have focused primarily on how citizens engaged in international mobility understand citizenship (Leitner and Ehrkamp 2006; Phalet and Swyngedouw 2002; Rutter, et al. 2008; Timonen and Doyle 2009). Yet as Phalet and Swyngedouw (2002: 10) argue "if one accepts the premise that the average citizen is neither empty-headed (the ignorance argument) nor a scatterbrain (the inconsistency argument), one is bound to take seriously the empirical analysis of the subjective political landscape as seen from below."

This thesis aims to address this gap and offers a sociological study of how one aspect of citizenship – namely social citizenship – is understood and enacted by one social group

facing the problem of inclusion – namely Polish migrants residing in Britain in the second half of the 2000s, most of whom arrived to Britain *en masse* after the 2004 EU enlargement. By taking the case of Polish migrants in the UK, this thesis explores how various safety nets and social provisions operate for intra-European migrants thus also providing an empirical test of European (social) citizenship.

The rights of immigrants are often discussed taking for granted the so called “Westphalian order” – the political division of the world into a system of sovereign and equal nation-states with relatively stable borders (Bauböck 2007: 88). The tendency to naturalise this historically and socially contingent system termed “methodological nationalism” permeates much of the scholarship in migration studies (Wimmer and Glick Schiller 2002: 301). In this research I eschew the analytical implications of methodological nationalism, at the same time viewing the nation-state as a powerful collective actor which cannot be ignored analytically, but which should not impact deterministically the epistemology of migration and citizenship studies.¹

Scholars have suggested a number of ways to move beyond methodological nationalism. One direction has been pursued within the sociological and anthropological literature exploring the normative possibility and empirical instantiations of transnational (e.g. Glick Schiller, et al. 1992; Kearney 1995; Kivisto 2003; Wimmer and Glick Schiller 2002) and cosmopolitan citizenship (e.g. Beck and Sznaider 2006; Delanty 2000; Rundell 2004). Although I share some of the claims put forward by the latter perspectives,² in this thesis I explore yet another way of removing the epistemological barrier of the nation-state by studying mobility from the perspective of human agency (Castles 2007; Favell 2008).

Defying the nation-state endorsed categories of thinking, in this thesis I treat migrants as if they were full and equal citizens of their societies of residence, in other words as if the problems of inclusion and recognition did not exist and as though migrants themselves fully identified with the citizenry of their place of residence. This allows me to see to what extent the actual norms and practices differ from these heuristic assumptions.

¹ Although as Favell (2008: 269) notes the latter is extremely difficult to achieve as the bulk of definitions, typologies and tools used by migration scholars are conventions imposed by the nation-state.

² For instance I share the view that modern societies experience the “*unintended and lived* cosmopolitanism” visible in an increasing interdependence of lives of ordinary people in different societies (Beck and Sznaider 2006: 9). However this does not mean that people embrace cosmopolitanism as their normative outlook or a form of identity, in fact at present the opposite seems to be the case.

These premises would, no doubt, raise eyebrows among many political scientists who argue that modern citizenship is necessarily linked with the ideas of nationhood and national identity, thus making the substandard citizenship status of cultural outsiders a logical inference (e.g. Brubaker 1992; Miller 2008). Even some sociologists adhere to a view that “citizenship can only function within the nation-state” arguing that “some terms are properly national and must remain so” (Turner 2006: 146). The implication of such a stance is that although immigrants’ contribution to the economy of a host society is welcome, they “do not fit easily into a welfare model of contributory rights” (Turner 2006: 149).

In contrast, my assumptions resonate with the work of scholars who reject the conflation between nation-state and citizenship, view citizenship as practice and as a “primary right of inclusion and membership” having “an ontological status” and who search for ways of renewing liberal democracy by exploring its internal contradictions and deliberative, active, multiple and workable citizenship forms (e.g. Somers 2008: 6; Balibar 2004; Bauböck 2009; Benhabib 2004; Mouffe 2000). The latter perspective opens up a multitude of ways of seeing migrants as part of host societies and polities, for instance as contributors to public goods, subscribers to the social contract, functional stakeholders in a society, corporeal beings or deliberative agents. By seeing citizenship as the ultimate “right to have rights” and migrants as citizens I invert the nation-state centred portrayal of immigrants as outsiders whose rights are often presented “as duties we take upon ourselves, as acts of generosity or unilateral largesse” (Sayad 2004: 224).

In that sense this thesis does not fit neatly with much of the literature on citizenship rights of migrants which explores the differential positioning of migrants vis-à-vis home and host nation-states, leaving the latter concept intact and unexamined. Instead it aims to explore a bottom-up meaning of citizenship and, in particular, of social citizenship, refraining from the foreclosing assumptions of its links with the nation-state, unless such links ensue as salient in the popular opinions.

This thesis aims to present the perspective of individuals engaged in international migration within the liberal EU migratory space as a means of bettering their own and their families’ wellbeing. The main research question aims to address Polish migrants’ understanding and usage of British social citizenship. The notion of social citizenship was operationalised as being represented by three crucial institutions of the British welfare state: non-contributory welfare benefits, social housing and public healthcare. The research examined why and how Polish migrants engage with the British welfare

state and their access to, usage and evaluation of British public services. Whilst the research was focused on exploring engagement with the British welfare state institutions, alternative arrangements – informal, privately purchased or accessed via the Polish welfare state – were also investigated. Moreover, as the norms and practices are intertwined in everyday life and in the notion of citizenship itself this study touched upon the normative views on redistribution and welfare (see also Dwyer 2000; Marshall, et al. 1999).

The areas of welfare benefits, social housing and public healthcare were chosen as substantive foci for several reasons. Firstly, they all represent non-contributory social entitlements, which are vital yet expensive, thus making access to them a litmus test of the boundaries of welfare community endorsed by the “asymmetrical solidarity” and “ties of ‘we-ness’” (Ferrera 2005: 133). EU member states strive to retain full control over such benefits by limiting their exportability abroad and by setting the eligibility criteria. Secondly, they are fundamental areas of any welfare state as they aim to address the basic human needs of physical survival and wellbeing. Thirdly, due to their vital function these areas of the welfare state serve as enablers for being a full citizen. Finally, despite the similarities, there are also a number of differences between these three areas, for instance in terms of the local delivery mechanisms which may affect the experiences of migrants.

Polish migrants were chosen because they represent a unique case of large-scale economic migration to the UK, enacted within the new institutional settings of intra-European mobility. Arguably the situation of Polish migrants in the UK is highly novel in that in this case mobile individuals are relatively unconstrained in their choices by immigration policies. Moreover the host government has little control over these flows, aside from leaving the European Union. Thus by exposing the treatment of intra-EU immigrants and their actions this study provides a test of EU citizenship and of the EU itself, as arguably it remains unclear what the EU represents at the societal level.

It is by now well documented that the post-2004 Polish migration flow comprised mostly young, relatively well-educated people eager to take jobs in various corners of the UK (Drinkwater, et al. 2006; Eade, et al. 2006; Gilpin, et al. 2006). Polish migrants were also characterised by certain “intentional unpredictability” (Eade, et al. 2006: 11) regarding the intended length of stay. This makes it difficult to compartmentalise this flow unequivocally as either temporary, seasonal, circular, long-term or settlement migration.

In terms of the stock of foreign nationals residing in the UK, in 2007 for the first time Poles displaced the Irish as the largest migrant group from any single country. In 2008 the stock of Polish citizens in the UK was estimated at 500,000, which constituted nearly 12% of all foreign citizens residing in the UK and about 0.8% of all UK residents (Salt 2008: 41, 49). The prominent position of Polish migrants in the British labour force is testified by the figures of nearly 613,000 Poles who registered their employment in the UK between May 2004 and December 2008 (HO 2009f: 9) and over 766,000 National Insurance Numbers (NINo) issued to Polish citizens in roughly the same period (DWP 2009). Between 2004 and 2008 Poles came top every year in terms of NINos issued to foreign citizens.

In order to proceed with an investigation, one needed a research method able to capture the subjective meanings of social actions. I opted for grounded theory (GT) which entails an intensive fieldwork, attentive analysis of primary data and construction of bottom-up accounts of the unfolding social processes and interactions, staying as close as possible to the agents' perspective (Charmaz 2006; Strauss and Corbin 1998 [1990]). To this end the research did not begin with a set of predetermined hypotheses or clear conceptual apparatus, but allowed for relevant mechanisms and notions to emerge gradually in the course of fieldwork and analysis.

In order to collect the primary data, in 2007/08 I conducted in-depth interviews with 62 Polish migrants residing in London and engaged in a period of participant observation.³ In 2009 this was complemented by a follow-up online questionnaire aiming to re-contact all participants. The research questions posed also required an inspection of secondary data in the form of legal provisions. This is in order to ascertain the structural opportunities and barriers which may have an impact on individual actions. Finally, I reviewed official statistics which reflect the collective position of Polish migrants a few years after EU enlargement as far as the take-up of British social rights is concerned.

This research showed that the EU freedom of movement provisions, transposed into the UK legislation, set the institutional framework for social rights' take-up by Polish migrants in the UK (see Chapter 4). As well as paving the way to social entitlements for EU migrants, these provisions also act as a barrier to claiming British welfare benefits and social housing by economically inactive EU migrants. Such restrictions are reflected in the statistical data on the scale of take-up of social rights by migrants. In

³ The adoption of qualitative research techniques such as in-depth interviews has been noted as most suited to capturing the nuanced civic views and practices (Phalet and Swyngedouw 2002; van Deth 2007).

line with other studies (Dustmann, et al. 2009; Rutter and Latorre 2009) the review of the 2007/08 Labour Force Survey data showed that the overall take-up of welfare benefits and social housing was lower among Polish citizens residing in the UK compared with UK citizens (see Chapter 4.5). One can argue that alongside eligibility issues, individual preferences and views also play their part in influencing the take-up of social rights by Polish migrants. A study by Timonen and Doyle (2009) suggests that migrant workers may be reluctant to engage with the host (liberal) welfare states due to negative views on welfare dependency, preferring to rely on the labour market and social networks for the satisfaction of their needs and aspirations.

Certainly the reasons for migrants' engagement and non-engagement with the host welfare states are complex and include such factors as migrants' legal status, employment situation, planned length of stay, rationale of migration, knowledge of the welfare system, individual social attitudes to welfare and the host society's readiness to recognise the rights of immigrants. Thus among other factors it depends on the self-positioning of migrants in British society, with some viewing engagement with the British welfare state as incompatible with their self-perceptions, whilst others – as consistent. Based on the interviews conducted, I distinguish three types of self-positioning which attain to non-engagement: market, care and indeterminate logics and three types which pertain to engagement: needs, desert and membership logics. These logics represent different sets of internally consistent attitudes stemming from the self-positioning in British society, which in turn is influenced by the rationale of one's stay in Britain. Thus a particular logic comprises both a way of thinking about oneself and a tendency to act in a manner consistent with that thinking. As these logics are shaped as a result of past experiences and at the same time structure future actions in a perpetual process of transformation, attitudinal shifts may occur during a person's stay in Britain. The research indicates that the logic of desert, referring to a principle of social justice conditioning rewards upon contributions or "giving people their due" (Marshall 1998: 334), and the logic of local membership serve as prime legitimating bases for constructing claims to British social citizenship by Polish migrants.

Apart from the attitudinal dimension, the in-depth interviews with Polish migrants give an insight into a range of institutions and practices geared towards the satisfaction of welfare needs both within and outside the formal welfare state. The practices of subrenting, squatting, going to Poland to seek private medical treatment or relying on family members for childcare are examples of institutions sustaining the non-

engagement with the formal welfare state. In contrast, the negotiation of social rights in encounters with formal welfare providers exposed various interactional strategies and problems comprising the engagement practices. The analysis of the process of engagement and non-engagement led to the conclusion that both courses of action have profound, albeit different, consequences for the individual – with engagement potentially improving living standards but increasing individual dependence on state welfare, whilst non-engagement allowing for greater flexibility in mobility decisions yet privatising any associated risks and costs.

The subjective construct of social citizenship communicated by the participants remains multilayered and sophisticated. It includes the non-national foci of identification with the welfare community of residence rooted in the local and supranational sense of membership and in the principle of desert stemming from contributions to the common good by virtue of work and obeying the law. National identification remains important insofar as home country allegiances and cultural identity are concerned. These findings resonate with other studies which found that migrants have civic allegiances with both origin and residence countries, but the latter are based on the social contract rather than national identifications (Phalet and Swyngedouw 2002). Participants did not seek any special rights over and above equal treatment and tended to apply the same principles of social redistribution to both in-group and out-group members.

Moreover the narratives show that participants have a clear ideal of a good citizen which has a distinctly humanistic and non-national character akin to “*being a better (...) man*” (Wanda). Similarly the duties and practices that participants thought citizenship entails were widely acknowledged and enacted. Thus one can conclude that immigrants do not have a substandard sense of citizenship but that the latter may be somewhat apart from the understanding of citizenship officially endorsed in the host society.

This thesis is organised into six chapters. In Chapter 2 I review the relevant sociological literature on social citizenship and principles of social justice in multicultural settings. Chapter 3 deals with aspects of the grounded theory research method chosen to study an understanding and practices of social citizenship. Chapter 4 offers a review of relevant EU and UK immigration and social security policies and of statistical data on the take-up of UK social entitlements by Polish migrants. Chapter 5, which is the main analytical chapter presenting an analysis of in-depth interviews, is split into two large subchapters each tracing the logics and practices respectively of non-engagement and engagement

with the British welfare state. Finally, Chapter 6 brings together the analytical conclusions and traces theoretical and policy implications of this empirical research.

The fact that Poland lacks the historical and institutional legacy of welfare capitalism and that the Marshallian model of social citizenship does not provide, at least on the theoretical and ideological levels, any space for accommodating immigrants makes investigation of Polish migrants' understanding of social citizenship even more intriguing. It is to an exploration of the theoretical horizons of the social citizenship concept that I now turn.

Chapter 2. Migrants as social citizens. A literature review

This chapter offers a critical review of the selected sociological literature on citizenship and migration. Particular attention is paid to the studies exploring the notion of social citizenship, normative issues surrounding the redistribution of public resources within an ethnically diverse society, and public attitudes towards citizenship and social justice. The final section of the chapter reviews literature which places social citizenship and mobility firmly within the remit of human agency.

2.1 T.H. Marshall's theory of social citizenship

Since T.H. Marshall's (1950) seminal work, modern citizenship is thought of as a composite phenomenon embracing a bundle of rights which developed incrementally. Marshall analysed the evolution of citizenship in England. He attributed the crystallisation of civil rights with its independent judiciary system to the 18th century, political rights guaranteed by elected parliament to the 19th century, with this evolutionary process culminating in social rights embodied by the welfare state in the 20th century. Yet, as a number of scholars observed, the ideological foundations of Marshall's conceptualisation and its implications for social structure and human agency are not straightforward (Dwyer 2004; Powell 2002; White and Donoghue 2003).

The interpretative problems arise due to the vagueness of two central concepts in Marshall's analysis. Marshall (1950: 28) defined citizenship as "a status bestowed on those who are full members of a community". Yet what constitutes a community in the Marshallian sense remains open to interpretation. Similarly, as Powell (2002) observed, the definition of social rights offered by Marshall contains both the minimum and the optimum versions of social rights, which can lead to two distinct sociologies. The first part of the definition "the right to a modicum of economic welfare and security" (Marshall 1950: 11) suggests a basic minimum standard, below which lies destitution, to which a citizen should not be allowed to fall. On the other hand, the second part of the definition, "the right (...) to share to the full in the social heritage and to live the life of a civilised being according to the standards prevailing in the society", implies a wide, all-encompassing notion of welfare, ensuring a comfortable lifestyle and guaranteeing full inclusion in the social, political and cultural spheres of society (Marshall 1950: 11).

Furthermore, it remains inherently difficult to achieve consensus on the minimum and the maximum scope of social rights. Castles and Davidson (2000: 110) note that social rights may include such areas as “the right to work, equality of opportunity (in education, the labour market and so on); an entitlement to health services, welfare benefits, social services in the event of unemployment or inability to work; an entitlement to a certain standard of education”. One can even argue that social rights cannot be precisely defined as their scope changes depending on the fluid definition of the social needs that they are meant to satisfy, and on the wider conditions and standards prevailing in the state and the economy (Hemerijck 1999). In that sense social rights are a result of ongoing societal negotiations.

Castles and Davidson (2000: 110) propose that at the heart of social rights lies the principle of “decoupling achievement from entitlement: everyone should be entitled to the minimum standard seen as appropriate for a given society, whether or not they are able to make an economic contribution”. This echoes the Marshallian description of social rights as “a universal right to a real income which is not proportionate to the market value of the claimant” (Marshall 1950: 47) and the notion of “de-commodification”, proposed by Esping-Andersen (1990: 21-22), which “occurs when a service is rendered as a matter of right, and when a person can maintain a livelihood without reliance on the market.”

In Marshall’s theoretical framework social rights constituted a remedy to social inequalities created by the market, thereby legitimating them. The provision of free and good quality education, healthcare and housing were meant to reduce inequality of opportunity, which in turn was meant to facilitate the social mobility of less well-off individuals. The equality of life chances, termed by Marshall (1950: 56) the “equality of status”, was considered more important than equality of outcome. Social rights were not seen as an end in itself, but rather as facilitating people’s participation in a community as citizens.

In later works Marshall (1981) acknowledged that rather than straight compatibility, there is a permanent tension between market, democracy and the welfare state. Rather than overcoming the inequalities of capitalism, the welfare state and democracy may have legitimised them through the introduction of means-testing and establishing an ethically permissible scale of inequality as a result of trade union bargaining processes and progressive taxation. The tension within the “hybrid or hyphenated social structure” of “democratic-welfare-capitalism” is due to the fact that “all three components accept

inequality, but without any agreement as to its pattern in any detail” (Marshall 1981: 119). Thus essentially this is a moral rather than a structural tension, which is down to corrupt values such as “materialism, profit-seeking, quantity-worship and growth-mania” that permeate society and to the lack of consensus on the values that ought to set moral standards instead (Marshall 1981: 120-121).

Many scholars have engaged critically with T.H. Marshall’s theory since its formulation. Turner (1990: 91) views Marshall’s theory of citizenship as “a specifically social version of the individualistic ideas of English liberalism”. Delanty (2000: 20) terms it “left-wing liberalism”, whilst Dwyer (2000: 46) sees it as a synthesis of “a liberal approach” emphasising individual rights with “a communitarian concern for the development of community consciousness”. Thus it is not surprising that it is a theory riddled with contradictions and ambiguities. Turner (1990) distinguishes nine broad critical points that are commonly raised with regards to Marshall’s theory: evolutionary accumulation and irreversibility of rights, the unitary nature of civil, political and social rights, claims of ahistoric citizenship theory, the top-down view of citizenship neglecting the role of social movements, ethnocentrism, ‘male-centred’ citizenship disguised as ‘universal’, ambiguity in the relation between social rights and the market, the underdeveloped theory of the state, taking the nation-state for granted and the underdeveloped economic sociology of redistribution of public goods.⁴ Turner emphasises that some of these critical points result from a misunderstanding of Marshall’s work. For example Marshall discussed at length the distinct, enabling nature of social rights as opposed to civil and political ones, the historic contingency of their emergence and ambiguous relationship between social citizenship and social class. Yet other critical points remain valid if somewhat unfair, since as Powell (2002) noted, no one has yet managed to settle such contestable issues once and for all. Furthermore, many of these points were beyond the scope of Marshall’s work, since he devoted most of his writings to exploring the dialectic between real inequalities created by the market order and equality of modern citizenship understood as status. Nevertheless, three critical points are particularly salient for this thesis: the essentialist view of the nation-state, a neglect of gendered citizenship, and the lack of reflection on the contentiousness of the redistribution of public goods.

Firstly, Marshall (1950: 40-41) observed that citizenship entails “a (...) direct sense of community membership based on loyalty to a civilisation which is a common

⁴ A similar review is offered by Dwyer (2004).

possession”. In other words enjoying citizens’ rights both requires and promotes a bond of allegiance and loyalty to the society in which one lives. Although there is some ambiguity as to the form of such society (Powell 2002), the bulk of commentators agree that Marshall in this passage endorsed the nation-state as the main community of social citizenship.

Yet one can argue that the nation-state was understood by Marshall (1950: 40) chiefly as a community organised around the overriding duty to contribute to the common good and not around the “the fiction of common descent”. Arguably, Marshall’s affirmation of the nation-state as a tool for delivering egalitarianism and the vehicle for social solidarity should be seen in the light of the nationwide British WWII effort and post-war mobilisation for rebuilding. The principal duties of a social citizen are a duty to work, to pay taxes and insurance contributions, to have “a lively sense of responsibility towards the welfare of the community” and the “obligation to live the life of a good citizen, giving such service as one can to promote the welfare of the community” (Marshall 1950: 70, 78). Hence Marshall’s take on the role of the nation-state has social democratic roots and can be contrasted with the views of liberal nationalists (Goodhart 2004; Miller 2003; Miller 2008). The latter view endorses national identity as the main and only source of social solidarity capable of conveying the redistribution of public goods, thus downplaying the importance of the principle of contribution and deep social divisions among those who share the national identity.

Although the concept of the nation-state implicitly permeates Marshall’s writings, the author took it for granted and failed to problematise it. Yet the link between social rights and nation-state membership ceases to be straightforward when one takes into account the position of ‘entitled outsiders’ within the nation-state – immigrants and other social groups, who have access to formal social (and other) rights, but who do not share the dominant cultural or national identity. Such a situation is often described as decoupling of rights from identities. Thus Marshall’s writings fall short when it comes to the boundaries and limits of citizenship, and the dynamics of inclusion and exclusion, which are at the heart of the current citizenship debates.

Lister (2001: 324) observed that citizenship is a “quintessentially male” concept. Historically, women’s citizenship was substandard and continues to be substandard to this day in many respects. For a start, the linear evolution of rights, outlined by Marshall, was criticised by many feminist scholars for not representing women’s

struggles appropriately.⁵ As Walby (1994) notes, in the other developed countries of the West the granting of political rights generally preceded the guarantees of civil rights for women, whilst in the UK the struggle for women's political and civil rights was intertwined. Scholars note that in the course of the 19th century in Britain, as male suffrage gradually broadened, women's civil rights diminished. This period is described as "the peak of private patriarchy" (Kofman, et al. 2000: 83).⁶

The position of women with respect to social citizenship is also peculiar. Orloff (1993) offers a gender critique of one of the central tenets of social citizenship – the notion of de-commodification. According to the author, men gain some leverage against the market not only thanks to the operation of the welfare state, but also thanks to the unpaid caring and domestic work done by women within the households. Women, on the other hand, face two main problems stemming from their roles within the private sphere. Firstly, their contribution in the private sphere is not recognised in the public sphere and does not lead to the same level of social protection as full-time, lifelong employment. Hence they cannot benefit from de-commodification of (domestic) labour to the same extent as men do from de-commodification of paid labour.⁷ In that sense, Lister (1990: 434-435) argues, women are second class social citizens as social rights "come to them second hand, mediated by their male partners, so that, in practice, they cease to be rights at all". Secondly, the benefits of de-commodification for women may not be as apparent as for men. As Orloff (1993: 318) states, "for many women and others excluded from paid labor, commodification – that is, obtaining a position in the paid labour force – is in fact potentially emancipatory." This is because, whilst for men domestic life offers some escape from paid labour, from the state's interference and is also a site of leisure and rest, for women, households remain the site of labour and male dominance.

The emergence of welfare capitalism as a result of labour movements has been built on the foundations of gender stereotypes assigning women the role of carers in the private sphere and assuming their economic dependence on men. Orloff (1993: 318) points out that this was a project "aimed at securing the position of male workers as breadwinners when they were unable to support their families due to loss of jobs or wage-earning

⁵ Marshall (1950: 18) was aware of a different trajectory of women's rights describing it as "in some important respects peculiar" but did not elaborate this point further.

⁶ In Britain women were granted voting rights in stages in 1918 and in 1928 (Walby 1994).

⁷ Thus the truly gendered concept of social citizenship should offer some protection not only "from compulsion of participating in the market" to sustain livelihood, but also from coercion to remain in marriages and domestic labour (Orloff 1993: 319).

capacities”. This resulted in persisting deficits of social rights for women (Lister 1990). Thus one should lift “the veil of gender-neutrality” from many conceptualisations of citizenship, including the Marshallian one (Lister 2001: 323).

The final drawback of Marshall’s theory, crucial for this thesis, relates to the lack of reflection on the scarcity of public goods and the resulting competition over access to them. One can discern a somewhat optimistic assumption that people eagerly embrace redistribution on the basis of loyalty, membership and solidarity. Yet the welfare state is an expensive enterprise funded by taxpayers and the questions – to whom, how much and according to which criteria to distribute the precious resources – remain contentious. One can argue that Marshall’s social citizenship paradigm does not offer much guidance in terms of the principles and practice of welfare distribution. One has to look elsewhere for a discussion of how to define membership in, and exclusion from, a community of welfare, how to accommodate ethnic diversity within the redistributive project of a society, how to mediate conflicting interests of different social groups, what principles of justice to endorse in particular circumstances and how to agree on those in a fair process. Yet arguably, above all, one has to take into account public opinion on such issues. Marshall’s top-down approach lacks reflection on the need for the ongoing, democratic legitimisation of the welfare state, portraying it instead as “an inalienable right to support” provided by the hegemonic state (Klausen 1995: 245).

2.2 Formal and substantial citizenship – recognising civic inequalities

The potential of citizenship to perpetuate inequality was fully recognised by Marshall and further conceptualised by Lockwood (1996). Lockwood examined how the main vehicle of social integration – citizenship – stratifies life chances and social identities, under conditions of social and economic inequality. According to the author “the institutionalisation of citizenship is embedded in, and at the same time contributes to, the structure of social inequality” (Lockwood 1996: 533). To illustrate the stratifying impact of citizenship, the author proposed a two-dimensional ‘civic stratification’ typology by crisscrossing the presence or absence of formal “citizenship rights” with the presence or absence of “moral and material resources” to exercise them (Lockwood 1996: 536). The four resulting positions were named as civic gain, civic deficit, civic expansion and civic exclusion. Lockwood argues that migrants tend to occupy either positions of civic deficit, if they have extensive citizenship rights, however not enough

moral and material resources to exercise them, or the position of civic exclusion, where they lack both full citizenship rights and resources to exercise them.

Arguably, central to Lockwood's (1996: 536) proposal is his definition of moral resources, which refer to "advantages conferred by social standing and social networks, command of information, and general know-how, including the ability to attain one's ends through activation of shared moral sentiments, whether or not the actor's orientation to such standards is sincere or disingenuous." This definition emphasises that exercising formal citizenship rights takes place in interactional and institutional contexts, where all of the mentioned factors matter for the achievement of or failure to achieve the desired goals. Thus for example, middle class people may have an advantage in terms of accessing healthcare, education or other public services simply because they have greater cultural capital, employ the right interactional strategies, in short have greater "moral resources" than working class people.

Lockwood (1996: 542) recognises the fluid nature of citizenship, stating that "its frontiers are continually tested and contested, and usually by those whose resources are greater rather than lesser". Thus in the case of an absence of some formal rights, social groups with resources can turn to civic activism to try and expand their rights. Yet Morris (2002) notes that especially with regards to immigrants existing formal rights may contract or remain frozen as a result of social activism or state policy and not necessarily expand.⁸ According to Morris (2002: 155) it is "important that expansion be viewed not against individual exclusions, but against contractions in the overall regime of rights, as there is no guarantee of an irreversible expansionary dynamic in relation to rights."

Lockwood's typology captures a difference between formal and substantial aspects of citizenship. For Castle and Davidson (2000: 84) this amounts to the difference between "becoming a citizen" and "being a citizen". Formal citizenship refers to a set of rights, to which one is formally entitled as specified in the legislation on the basis of citizenship stemming from the principles of 'ius soli', 'ius sanguinis' or 'ius domicili'. In contrast, substantial citizenship is defined as "equal chances of participation in various areas of society, such as politics, work, welfare systems and cultural relations" (Castles and Davidson 2000: 84). In the case of social rights the success or otherwise of exercising the rights is mediated in everyday often face-to-face interactions, whereby

⁸ One example is the contraction of social rights of asylum seekers in the UK in the 1990s (Morris 2002).

individuals come across the officials administering citizenship rights. In this sense substantial citizenship is embedded within the interaction order, whereby partners of unequal social standing choose to respect or deny each other's equal standing as citizens (Colomy and Brown 1996).

This sociological perspective can be contrasted with the political science perspective discernible in the works of otherwise quite dissimilar scholars such as Brubaker (1992) and Bauböck (1994). In the latter perspective the "formal" (Brubaker) or "nominal" (Bauböck) aspect of citizenship signifies the relationship between an individual and a particular state. It is a purely legal status "empty of any particular content" (Bauböck 1994: 23). In contrast, the "substantive" (Brubaker) or "substantial" (Bauböck) aspect of citizenship refers to the scope of rights and obligations embedded in the relationship between an individual and his state, or to be precise between a state and its individuals as the state has analytical priority. Thus the latter understanding of substantial citizenship omits the relationship between individuals within the state and ignores the interactional nature of citizenship. This is because as Bauböck (1994: 26) points out political science perspective views citizenship as a "membership in a polity rather than in a society. (...) Rights and obligations are the very substance of political membership even when they appear to be merely formal."

In this thesis I follow the sociological perspective by treating any existing rights as indeed 'merely formal' and only substantiated when attempts are made by various categories of citizens to make use of them in everyday interactions involving both persons in charge of administering the rights and other co-citizens. One can argue that the sociological understanding of this difference rather than political science one is more suited to exploring the contemporary take on citizenship as both status and practice (Isin and Wood 1999).

Finally, one should return once again to the special status of social rights compared with political and civil ones. Castles and Davidson (2000: 105) stress that the Marshallian idea of interdependence of various types of rights implies the necessity of possessing social rights in order to be able to exercise civil and political rights and achieve full citizenship. The distinctive nature of social rights, noted by Marshall, is that they provide the means to participate in other spheres – chiefly politics, economy and (national) culture, as well as guaranteeing various personal freedoms. In this sense social rights are regarded as enabling rights. Yet in the light of the sociological distinction between formal and substantial aspects of citizenship, it appears that having

the formal social rights is not the same as being able to take advantage of them. Hence for the 'enabling' function of the social rights to have an effect, it is not sufficient merely to possess formal social rights, but one also needs to be able to exercise them substantially.

2.3 Normative dimension of social citizenship

Apart from the political and sociological dimensions (status and practice), citizenship also has a crucial moral dimension exemplified by social norms (Dwyer 2004). Marshall's writings contain little in terms of guidance on normative foundations of redistribution. Thus it is necessary to set the ground for a sociological understanding of social justice. As the Oxford Dictionary of Sociology suggests, justice can be defined as "a central moral standard in social life", with social justice covering "the allocation of scarce goods (and 'bads') to a population: both are premised on the ideas of due process, impartiality, and distribution according to appropriate criteria" (Marshall 1998: 333). The difficulties in specifying which criteria of allocation are 'appropriate' make the concept of social justice a subject of great theoretical disputes. The most common criteria that are proposed by scholars representing different political and philosophical stances are "desert, merit, entitlement, equality of outcome, equality of opportunity, need and functional inequality" (Marshall 1998: 334). However this opens up problems of specifying them further and deciding which ones apply in specific situations and with regards to which social groups. Five broad theoretical perspectives on reconciling redistribution with ethnic diversity are reviewed below. This is followed by a note on public attitudes towards distributive justice.

Liberal nationalist stance

Some social commentators argue that the increasing ethnic diversity, a result of immigration and the presence of ethnic and national minorities, has some adverse effects on social integration of western societies. Scholars such as Miller (2003; 2006; 2008) or Putnam (2007) are generally sceptical about the possibility of reconciling social justice, redistribution and the welfare state with ethnic diversity. This is because redistribution from rich to poor and from adults to young and old is contingent upon high levels of societal (generalised) trust and cooperation. Yet since we trust those with whom we identify, it is necessary "for the citizens to share a cultural identity of the kind that common nationality provides" (Miller 2008: 378). Furthermore, Miller (2003)

argues that people's sense of justice is derived from the culture of the group to which they belong and subsequently we cannot assume that principles or 'appropriate criteria' of social justice will converge across groups. Consequently, cultural groups might be willing to practise social justice towards insiders, but not towards outsiders. According to Miller (2003), the extent to which cultural groups are willing to practise social justice towards outsiders depends on the spatial pattern of intercultural relations, with groups living side by side and having close contacts displaying the highest level of generalised trust. In terms of policy solutions, this requires promoting selective multiculturalism "that extends special treatment to cultural minorities when, but only when, this serves to integrate them more closely into the wider community as equal citizens" (Miller 2006: 338).

Societal trust is crucial for redistribution as it allows us to believe that others will not free ride. It allows us to behave honestly, because we assume that all other people behave honestly too. Yet Putnam (2007) argues that in the short run, ethnic diversity leads to anomie of social bonds, reduction of both bonding and bridging social capital and isolation. In short it brings out "the turtle in all of us" (Putnam 2007: 151). He notes that in the long run these negative effects of diversity will be overcome by "cross-cutting forms of social solidarity and more encompassing identities", not least as a result of nation-state's policies that "encourage" a sense of membership and a shared identity (Putnam 2007: 137, 161).⁹

The main conceptual criticism regarding the liberal stance is the treatment of citizenship as an ascribed status attained by virtue of belonging to an essentialist national community. This strips citizenship of active and moral dimensions. One can argue that the conflation of nationality and citizenship, as crystallised in the ideology of the nation-state, has obscured the underlying normative realm of citizenship and replaced it with the national identity construct as the 'pseudo-moral standard' allegedly able to settle all debates about membership and redistribution and one which all citizens must comply with. The problem with such a view is that it is empirically unsustainable. For instance the shift of public opinion towards a more conditional and contributory conception of welfare benefits may not be due to increased ethnic diversity, but to the

⁹ Putnam (2007) analysed individual and aggregate level data from 41 ethnically diverse neighbourhoods in the US, comprising about 30,000 individuals. Arguably, the analysis has a number of methodological caveats stemming from the multilevel structure of the dataset.

opposition to treating social rights as passive entitlements per se, including those stemming from common nationality.

The view that citizenship is inescapably linked with national identity can be refuted by noting that ideas of citizenship have preceded the development of the modern nation-state, whilst ethnic diversity was a feature of many societies across historic periods (Burchell 2002; Williams 2007). Furthermore equating citizenship with national identity masks deep inequalities and divisions within any society. For example, welfare recipients rather than being perceived as “one of us” by their fellow nationals were usually stigmatised, perceived as different, and historically have been even excluded from a common citizenry, despite sharing the same national identity (Barton and Johns 2005). Another criticism is advanced by Williams (2007: 254), who points out that some mechanisms of globalised, post-industrial capitalism represent a far greater threat to redistribution than the absence of common identity between members of welfare systems.

Methodologically there are no self-evident causal links between ethnic diversity, societal trust, social solidarity, multicultural policies, support for the welfare state and public spending. The observed correlation between an increase in ethnic diversity and diminishing support for the welfare state via decreasing generalised trust can be interpreted in different ways. One example is that the retreat of the welfare state increased the feeling of insecurity and competition between ethnic groups, which in turn exacerbated interethnic relationships and resulted in the erosion of social trust.

Multiculturalist stance

At the other end of continuum one can place the arguments of such scholars as Banting (2005) and Kymlicka (1995; 2001) who generally do not find any links between the growth in ethnic diversity and reduction in social solidarity. For example Banting (2005: 98) argues that immigration, multiculturalism and redistribution go hand in hand and “represent a stable political equilibrium” in Canada as opposed to the US. Banting (2005) found no correlation between ethnic diversity and support for social spending, rejecting the claim that the majority withdraws its support for the welfare state because of the presence of ‘strangers’ amongst them. Another study examining cross-national aggregate indicators found no evidence that multicultural policies are related to the

weakening of the welfare state as measured by public spending (Banting, et al. 2006).¹⁰ Thus such scholars argue that the trade-off between ethnic diversity and redistribution has been overstated.

Conceptually, this position is rooted in a defence of multiculturalism both as an ideology, a set of policies, and a characteristic of modern societies that has a “value” in itself (Kymlicka 1996: 121). For example for Kymlicka (1996: 83) freedom of choice and individual autonomy, the key tenets of liberalism, are predicated on a societal culture rooted in language and tradition, which both provides a range of options to choose from and “makes them meaningful to us”. The argument that one’s culture enables individual autonomy is behind the liberal argument for defending the collective cultural rights of various minorities. It is also behind the call for the need to go beyond the Marshallian triad of rights and include gender and cultural rights in the broadened concept of citizenship (Castles and Davidson 2000; Kymlicka and Norman 2000).

The methodological critique of the multiculturalist stance is similar to the one directed at the liberal nationalist stance. One can note that the so called ‘recognition vs. redistribution’ (Banting, et al. 2006) debate is plagued by the mismatch between aggregate and individual level data and the tendency to conflate correlation with causation. The conceptual critique of the multiculturalist stance is essentially a critique of the group rights discourse usually delivered from within the liberal citizenship framework (Joppke 2002) or by left-leaning authors whose stance is reviewed next.

Social democratic stance

Both liberal nationalists and social democrats are strongly attached to the idea of common nationality as the foundation for the welfare state. Authors like Wolfe and Klausen (1997) emphasise that the recognition of group rights and identity politics undermine the national solidarity needed to sustain the welfare state. This is because people have “a rather limited amount of political loyalty to give” and identity politics diverts attention from real problems of social and economic inequality (Wolfe and Klausen: 234-235, 238). The authors are supporters of the powerful state and urge the exercise of “constant vigilance against supranational pressures from without and subnational pressures from within” (Wolfe and Klausen 1997: 254). Thus only “mild

¹⁰ The authors took into account 11 industrialised countries in the period from 1980 to 2000 (Banting, et al. 2006). They examined links between percentage of GDP on public spending, Gini coefficients, child poverty rates, percentage of foreign born and minority population and the index of level of multicultural policies.

forms of identity politics” can be tolerated as long as they are compatible with “well-understood principles of assimilation and accommodation” (Wolfe and Klausen 1997: 242). This is because scholars believe that the nation-state is the only suitable vehicle for delivering equality of opportunity and sustaining the welfare state. This is also why they are generally “hostile to the notion of open borders” (Wolfe and Klausen 1997: 240). Although social democrats argue for a strong and expansive welfare state sustained by a populous “great community”, they are wary about the efforts to increase the size of such a community through immigration (Wolfe and Klausen 1997: 240).

In direct opposition to Kymlicka’s (1996: 180-181) assertion that social rights fall short of alleviating all inequalities and thus cultural rights are a necessary addition to Marshall’s triad of rights, Offe (1998: 140) is firmly against the creation of what he calls “a fourth generation of rights”. He argues that social rights are sufficient and more effective tools to “redeem the liberal promise of equal opportunity” than cultural rights (Offe 1998: 140).

Yet one can argue that the social democratic stance, by endorsing the statist view of the welfare state, overestimates the equalising potential of formal social rights at the expense of ignoring the substantial deficits in exercising those rights that a number of culturally and ethnically distinct groups face. Furthermore Hemerijck (1999) points out that the welfare state as a product of top-down state policy promotes passive citizenship and is particularly unfriendly towards grassroots communities, ways of life, and institutions of civil society. Thirdly, as Banting and Kymlicka (2006) point out, individuals are capable of handling multiple loyalties and thus the distinction between cultural and social rights should not be seen as zero sum game. Similarly, the sources of inequality are multiple and one should not neglect those created by cultural divisions, whilst taking into account only those created by social and economic ones.

Top-down “citizenships of globalization”

Arguably, the remaining stances are less orthodox in their arguments. As a result it is not easy to categorise them. They embrace various proposals which depart from common nationality, ethnicity and culture as necessary preconditions for liberal citizenship and have been described as “citizenships of globalization” (Williams 2007: 228). One can distinguish two sets within this eclectic literature, depending on their primarily top-down and macro level or bottom-up and micro level analytical standpoints.

The top-down type of literature is concerned with the drifting apart of the constitutive elements of 'traditional' national citizenship – status, rights/practice and identity – and thus with the loss of authority of the nation-state to subnational, transnational and supranational entities. It is often evoked in the context of regionalisation and devolution processes by stressing the multiple and multi-layered nature of citizenship (McCrone and Kiely 2000; Keating 2009). Alongside, scholars of mobility and migration put forward the proposals of post-national (Soysal 1994), transnational (Bauböck 1994), diasporic (Laguerre 1998), translocal (Appadurai 2003), cosmopolitan (Delanty 2000) citizenships and of constitutional patriotism anchored in civil society (Habermas 1994 [1992]). They challenge the exclusivity of the nation as the primary and only referent of a citizen's political identity. Instead a modern citizen can have multiple allegiances stemming from identifications with multiple polities from global humanity to particular local communities or with shared civic and political values.

For example, Bauböck (1994) argues for a more inclusive concept of liberal citizenship. He endorses an extension of all civil, political, social and cultural rights to resident migrants once they are admitted and reside within the state. As he claims "in liberal democratic states individuals who are admitted to the country must be treated not only as economic agents but as bearers of fundamental rights, and if they stay they ought to be treated as potential citizens" (Bauböck 1994: 325). In such a system most citizens will be simultaneously members of several horizontally overlapping or vertically nested polities as "state sovereignty is delegated both upwards and downwards" (Bauböck 2007: 108).

Jordan and Düvell (2003) looked explicitly at the issue of (global) social justice in the context of international migration.¹¹ They advocate the unconditional basic income proposal and analyse its implications in a world divided into bounded states and experiencing international mobility.¹² The authors argue that people should be free to live and work where they want and "they should do so as bearers of substantial rights to those benefits and services that they need in order to participate as equal and autonomous members in whichever societies they join" (Jordan and Düvell 2003: 138).

¹¹ Another take on potential redistribution mechanisms, which could function beyond national welfare communities, is offered by Bader (2007).

¹² Jordan and Düvell (2003) compared the idea of national basic income against global basic income. The former would be set at the highest affordable level by a particular country, and there would be a vesting period before newcomers from poorer countries could switch to it. The administration of global basic income funded by corporate taxation would entail a highly centralised system of international governance, whilst public services and infrastructure would be delivered locally by cities, regions or countries.

However they recognise the tension between the economic imperative of society, which points toward an open-border policy, and the principles of democracy and self-determination, which demand the bounded social contract establishing the rules, rights and responsibilities and ways of dealing with outsiders. Thus Jordan and Düvell (2003: 127) try to strike a balance between the interests of “the most vulnerable migrants and sedentary people”, the two groups that they see as generally not benefiting from globalisation.¹³

Bottom-up “citizenships of globalization”

The second set of literature focuses on grassroots democracy, bottom-up engagement and active citizenship often located in the urban spaces. For instance, the residential, urban citizenship (Bauböck 2003; Glick Schiller and Çalar 2009; Purcell 2003) or democratic, active citizenship (Balibar 2004; Stewart 1995) conceptualisations attempt to formulate the concept of a polity which is maximally inclusive, self-governed and morally grounded. Although all ‘post-national’ proposals offer a renegotiation of the meaning of citizenship, arguably the bottom-up literature provides most clues as to the actual position and lived experiences of immigrants within host societies.

According to Stewart (1995: 74) democratic citizenship is “created and reproduced through the constitution of substantive communities of reciprocity and balanced rights and duties”. It is a result of practice and engagement, taking place in the public space, which “need not, indeed should not, be thought of as embodying some anterior organic identity of territory or blood” (Stewart 1995: 74). Its potential is only realised in interactions, whereby people recognise “others” as different but at the same time as fellow democratic citizens of “equal social worth” (Marshall 1950: 40).¹⁴ In this sense the conception of democratic citizenship shares a lot with the ideas of interactional citizenship put forward by Colomy and Brown (1996).

Also the contractarian models of citizenship imply that in the democratic order if one is subject to the law of a particular state (for example, by virtue of work and residence there), one should ultimately get the equal right to determine and influence that law. Thus they are often used as arguments for the full enfranchisement of immigrants in the

¹³ In this sense the authors follow Bauman’s (1998) critical view of globalisation.

¹⁴ According to Stewart (1995), Marshall (1950: 40) did not acknowledge the tension between the two different versions of citizenship present in his work: citizenship as status based on membership of the nation-state and as a progressive idea of “equal social worth”.

host societies. Thomas (2002) distinguished two types of contractarian citizenship.¹⁵ The first one, “citizenship as equal rights for equal duties, or living together cooperatively” (Thomas 2002: 332), is anchored in active participation and care about the local community of residence. This includes such aspects as voting, neighbourliness, looking after green spaces, volunteering and taking part in local initiatives. The second version represents a “monetized contract: citizens as those who ‘pay their dues’”, whereby economic and financial contribution (through tax, employment, investments) paves the way for membership in a community of citizens (Thomas 2002: 335).

One of the main sites of revival of modern democratic citizenship is the city. Bauböck (2003: 150) argues that all residents of the city regardless of their nationality should enjoy all citizenship rights on the grounds of “automatic *ius domicili*” subject only to the length of residence. Also Bauböck (2003: 151) notes that “immigrants tend to develop an urban identity that can easily be combined with an ongoing national affiliation to their countries of origin.” Purcell (2002; 2003), building on the Lefebvrian notion of a right to the city, goes even further, resting membership and ownership of the city, the latter understood as a de-commodified usage of city spaces and resources, entirely in the hands of its inhabitants. The Lefebvrian version of urban citizenship entails a wide definition of city inhabitants, including undocumented migrants, short-term stayers, regular commuters, and even passers-by (Purcell 2002). In global cities local citizenship ties in with the global discourses on human rights, sexuality, and environmental movements, producing a “glocalised” version of citizenship (Purcell 2003: 572).

Since the above proposals are mainly concerned with new ways of organising the political community, the role of social rights within democratic versions of citizenship remains unclear. Secondly, if social rights remain crucial, then it is not clear how welfare will be delivered to citizens, for example how such responsibility will be divided between municipal and state authorities. Thirdly, if one allows for multiple local citizenships, as in Bauböck’s (2003) proposal, then it is not clear in which local community the social rights of a person who is a ‘dual local citizen’ will be anchored.¹⁶

¹⁵ She also distinguished political membership based on common descent by virtue of ‘blood’, on culture as an attachment to a particular way of life, and on belief as identification with founding principles of a community (Thomas 2002).

¹⁶ The principle of ‘*ius domicili*’, on which Bauböck (2003) builds his normative proposal for urban citizenship, is used in the international coordination of taxation and social security systems. However there are two key differences, firstly it operates on a national rather than municipal scale and secondly, it

Additional layers of complexity will arise as a result of international and internal mobility of individuals, creating a complex web of claims to social rights from various jurisdictions. Thomas (2002: 338) argues that in the light of diversity of labour and capital movements across borders, “it is too difficult to determine just which political community is the ultimate beneficiary of any given worker’s labor for it to be at all practical to determine who should count as a member of which nation-state on that basis.”

Perhaps the biggest drawback of democratic citizenship proposals with regard to social rights is their assumption that social justice is unproblematic. It assumes that citizens would democratically endorse the ethnically inclusionary mechanism of redistribution. However, there are good empirical reasons to doubt that redistribution will run smoothly in such a political community. The first big problem is the deficit of recognition of one’s contributions, input and engagement by ‘the other’. For example, hosts may not view immigrants’ monetized contributions and social engagement in their society as positive, as for native workers such ‘contributions’ may lead to job competition and social dumping of standards and wages (Thomas 2002: 337). Secondly, Hayward (2007) is sceptical of the potential of urban living to mould a new, shared sense of identity, to promote tolerance amongst strangers simply as a result of common inhabiting of public spaces within cities. She notes that instead “contact may encourage a heightened perception of conflicting interests and social differences” (Hayward 2007: 195).

Isin (2002: 314) argues that disentangling the relationships between ethnic groups in global cities in the context of citizenship claims is extremely complex, as the city is not a place of simple binary oppositions but a much more intricate network of struggles for rights and resources. Amin (2002) argues that a degree of contest is inevitable, however it is important that it takes place within a space of discursive dialogue, mutual awareness of each other’s positions, respect for each other as citizens, and leads to finding bottom-up, locally negotiated solutions. Amin (2002: 973), building on Mouffe’s (2000: 103) “agonistic pluralism”, maintains that these are the cornerstones of politics underpinning “local multicultures”, which he sees as a way of replacing the prescriptive, top-down discourses of social cohesion and integration.

usually does not allow for multiple residences for tax and social security purposes in order to prevent both double taxation and double payment of benefits and services.

These criticisms and caveats point to the fundamental “paradox” (Bauböck 1994: 239) or “chronic tension” (Hayward 2007: 181) within democratic citizenship, namely that citizenship which is both truly democratic and fully inclusive may simply be unattainable. Mouffe (2000) argues that the essence of democracy lies in the permanent tension between these two ideals. Thus democracy in itself is better understood as an open-ended and ongoing process rather than a state.

Although “the problem of inclusion” remains central to democracy (Dahl 1989), Bauböck (2009) argues that it cannot be resolved democratically. This is because the democratic process in itself does not protect against decisions which are oppressive, exclusionary or regressive (Purcell 2002). Hence Bauböck (2009: 21) proposes the concept of “stakeholder citizenship” whereby all and only those individuals whose “individual flourishing is linked to the future of that polity” are treated as members of it. The assessment of stakeholdership is carried out subjectively, i.e. by individuals themselves, and cannot be rejected by others.

The problem of inclusion is especially crucial for the “noncontractual” perspective on citizenship advanced by Somers (2008: 71). Citizenship is seen as relational, equal, reciprocal and absolute, whilst contracts are privatised, unequal and revocable. According to Somers (2008: 71) when citizenship becomes a contract it becomes a problem, not a solution. It leads to exclusion and stigmatisation of those citizens who are considered as having low market value. The noncontractual perspective boils down to the Arendtian notion of “the right to have rights”, which represents “an existentially foundational right” to recognition as moral and legal equals, which is the ontological essence of citizenship (Somers 2008: 6).

Somers (2008) acknowledges that the right to have rights is substantiated only through social practices of inclusion in political and social collectivities. Thus this approach to rights breaches the conceptual gap between human rights and citizenship rights, ‘denaturalising’ the former and making them contingent on social processes of recognition. This is why the social exclusion that some categories of individuals face in modern societies, including “internally stateless citizens”, such as Afro-Americans abandoned during Katrina hurricane, constitutes not just a problem of social justice but a problem of citizenship per se (Somers 2008: 58).

Other scholars argue that citizenship reaches not only beyond the contractual relationship, but also beyond the question of identity, however defined. Williams (2007:

228) abandons identity altogether as inherently divisive and proposes a relational definition of citizenship, defined in terms of “shared fate – the idea that we are enmeshed in relationships of interdependence with other human beings that emerge from the past and extend into the future” (Williams 2007: 228). The fact that our actions impact each other is a sufficient reason ‘to care’ about each other and sufficient legitimisation to have claims of citizenship. So citizenship is not a matter of identification but of moral principles. It is a kind of built-in moral compass that guides us through social life.

Social attitudes towards redistribution

A quest for a normative theory of social citizenship ought to be juxtaposed with public attitudes and preferences. Kumlin (2007: 363) distinguishes three levels of abstraction in attitudes towards welfare: the general, value-laden attitudes towards concepts such as “equality” or “taxation”, the middle level of “specific policy preferences”, and the lowest level of “even more specific evaluations” of welfare policies. He reviews a number of explanatory factors such as time and context, social class, self-interest, social justice, and policy feedback and finds that links between these factors and multi-level public attitudes to welfare are complex and not straightforward.

Relatively few studies explored immigrants’ attitudes towards the host welfare state directly. Timonen and Doyle (2009) analysed the attitudes of migrant workers, including Polish ones, residing in Ireland. They describe their respondents as “highly ‘commodified’” in the sense that their current wellbeing and future aspirations were closely linked with their performance on the labour market (Timonen and Doyle 2009: 172). The scholars noted that interviewed migrant workers made limited use of welfare benefits in Ireland, either due to poor information about their entitlements or due to reluctance to engage with the welfare system. In the light of largely critical attitudes to state welfare expressed by the respondents, the authors hypothesise that the attitudes of migrant workers do not differ significantly from the attitudes of the general Irish public as “both groups tend to aspire to better employment-related or private security, support the limited universal elements of the welfare state (such as child benefits) and reject the means-tested ones” (Timonen and Doyle 2009: 173). In that sense there is some evidence to suggest that hosts and immigrants share the same normative framework when it comes to views on redistribution.

Other studies provide further arguments for considerable cross-cultural and cross-national convergence of attitudes towards redistribution in favour of the principle of desert (Dench, et al. 2006; Dwyer 2000; Marshall, et al. 1999).¹⁷ For instance, the authors of a study conducted in London's East End argued that "older Bangladeshis in particular had moral misgivings about unreciprocated 'charity'" (Dench, et al. 2006: 227). Similarly, Dwyer (2000) found that British Muslim respondents were strong supporters of conditionality of unemployment benefits and were less likely to view the state as having the prime responsibility of ensuring citizens' welfare than white British. Both British Muslim and white British respondents justified taking away benefits from people who were perceived as unwilling to work without having a good reason such as informal care duties or medical grounds (Dwyer 2000: 121, 153, 185).

Dwyer (2000) showed that British welfare claimants perceive their social rights as an entitlement stemming from their membership in a state. They also view the government as having prime responsibility for ensuring their welfare, especially as far as healthcare and social security are concerned. In that sense the principles of a statist and paternalistic welfare state have solidified into the normative views about redistribution in Britain at least in some strata of the society. Yet, on the other hand, Dwyer's respondents were calling for and were ready to accept a large degree of conditionality of welfare rights in areas of social housing and social security. This included an obligation to behave in a socially acceptable manner, an expectation "to contribute in some positive way to the needs of the wider community" and, in the case of unemployment benefit, an obligation to look for work (Dwyer 2000: 196). Means-tested benefits, exemplifying the criterion of need, were viewed as unfair by some welfare claimants as "they tended to penalise those who had previously met their responsibilities to wider society through past financial and social contributions" (Dwyer 2000: 198).

At the beginning of 1990s British sociologists found widespread agreement on the normative views on redistribution between western capitalist and post-communist countries (Marshall, et al. 1999).¹⁸ This research showed that despite a malfunctioning operation of the principle of desert during the post-war period in Eastern Europe, the high regard for desert did not disappear from the normative repertoire of these societies. On the contrary, in virtually all surveyed countries there was overwhelming support

¹⁷ In contrast, the cross-cultural divergence shows up mainly in psychological experiments in small group settings reviewed by Miller (2003).

¹⁸ In 1991/1992 scholars conducted nationally representative surveys in 13 countries using a standardised questionnaire (Marshall, et al. 1999).

(80%-90%) for desert as the main criterion for income distribution and rejection of equality of income. Yet at the same time, with exception of US respondents, there was a strong expectation that governments should ensure a minimum standard of living for their citizens. The provision of healthcare was perceived as the crucial area of welfare where market based criteria of redistribution such as desert, ability to pay, merit and effort did not apply.

In particular, the differences between Polish and British respondents were small and usually showed stronger pro-market and conditional views of welfare by Polish respondents (Marshall, et al. 1999: 352, 356).¹⁹ For example, more Polish than British respondents were inclined to tie the level of earnings to the level of education, deemed it acceptable that those who have more money can secure better education for their children, endorsed the utilitarian criterion in the allocation of housing, or believed in the 'trickle-down effect' of capitalism. On the other hand, more Polish than British respondents maintained that satisfaction of people's needs is most important even if it involves the redistribution from rich to poor and deemed that persons with big families should be assigned greatest priority when it comes to the allocation of scarce medical and other resources.²⁰ Overall, Polish participants showed a high regard for market principles and family bonds, exposing a distinctively privatist strand in their views.

More recent data show that Poles are both striving for the equalising welfare state and endorsing market principles.²¹ The 2008 ISSP results reconfirmed that Poles have high expectations towards the Polish state as far as welfare provision and reduction of income inequality are concerned.²² Data showed that large majorities of Polish respondents agreed that government has a duty to provide healthcare (98%), jobs for everyone willing to work (88%), decent housing for poor people (88%), to reduce income differences between rich and poor (85%), to control prices (73%), and to

¹⁹ One should note that timing of this study may be important. The authors suggest that at the beginning of the 1990s some Eastern European countries may have been experiencing the "honeymoon period" with capitalism (Marshall, et al. 1999: 353). Furthermore, Polish enthusiasm for market principles might be due to the belief in the "moral superiority of Western democracies" (Domański 2002: 200). This was based on a conviction that in contrast to state socialism, capitalism is a fairer system based on equal opportunities and desert, rewarding innovative and educated individuals (Domański 2002).

²⁰ In contrast, the most popular method of allocating scarce medical treatment chosen by British respondents was to follow the rules of the hospital, whatever these may be. This resonates with the understanding of citizenship as obeying the law without the right to question it (Turner 1990).

²¹ This split in public opinion, makes some scholars emphasise the growing stratification of Polish society into "two Polands", with an increasing income, educational, cultural and attitudinal gap between urban intelligentsia and middle class and the rest of society (Śpiewak 2005).

²² International Social Survey Programme data are collected as a part of Polish General Social Survey programme, an ongoing nationally representative survey of Polish adults aged 18 and over, repeated every two to three years (Cichomski, et al. 2006).

intervene in failing companies to protect jobs (67%) (Cichomski, et al. 2009).²³ At the same time 68% of Polish respondents agreed that the market economy is crucial for Poland's economic development and nearly 50% of respondents supported less government interference in the economy (Cichomski, et al. 2009).²⁴

There is also notable cross-cultural convergence among Europeans with regard to a more general issue pertaining to citizenship, namely what it takes to be a 'good citizen'. Van Deth (2007: 415) found that across Europe the popular construct of a 'good citizen' is remarkably similar, with respondents consistently excluding political and social activism and including such factors such as "solidarity, obeying laws, autonomy, and electoral participation". This pattern was shared also by Polish respondents in the 2005 ISSP study. Only 23% of respondents stated that taking active part in social and political associations is important for being a good citizen. Other factors such as obeying laws (86%), paying taxes (73%), voting in elections (60%), helping less well-off people than oneself in Poland (66%) and in other parts of the world (52%), and attempting to understand people who have different views (57%) were considered a far more important part of being a 'good citizen' (Cichomski, et al. 2006: 438-440).²⁵

Despite this apparent normative convergence, various studies explored the host population's attitudes towards immigrants as potential recipients of welfare, uncovering mainly critical or hostile views. For instance a study conducted in London's East End explored the reasons for hostility between Bangladeshi families and the local white population (Dench, et al. 2006). The authors noted that the conflict has been exacerbated by competition over public resources, in particular schooling and housing. They argue that the move from the desert-based criterion of allocation of social housing to needs-based in the 1970s has been perceived by the local white working class as unfair (Dench, et al. 2006: 158). The length of time on a waiting list, which prioritised local, settled families and reflected their individual and collective contributions to the common good by working and the WWII effort, was replaced by the criterion of housing need, which prioritised poorer newcomers. Dench and colleagues argue that recourse to public goods is not perceived as an unconditional entitlement, but as recognition of one's contribution to the common good. So the welfare state entails a "moral sense of reciprocity" (Dench, et al. 2006: 184). Yet although immigrants and

²³ Variables GV5e, GV7a to GV7j (Cichomski, et al. 2009).

²⁴ Variables Q82, GV5c (Cichomski, et al. 2009).

²⁵ Variables CT1A to CT1I; percentages represent the sum of options 6 and 7 on a seven-point scale.

locals may fully share this view, the objective inequality created by the low-wage economy, which hampers the satisfaction of all welfare needs, combined with the scarcity of public goods, introduce competition and produce tensions between the two groups.

Arguably this explains why immigrants are often excluded from the welfare community. For instance, examining public attitudes in 23 European welfare states van Oorschot (2006: 38) found that “immigrant needy people are at the bottom of the deservingness rank order”. In 2003 the Ipsos MORI poll found that only 18% of British respondents felt that immigrants should have access to the same level of welfare as British citizens without any additional conditions (Duffy 2004). In 2008 a poll commissioned by the UK government found that 67% of respondents agreed that “migrants should not have full access to benefits until they become citizens”, whilst in turn maintaining that access to citizenship should be contingent among other things on having no recourse to benefits (HO 2008: 32).²⁶

Thus van Oorschot (1999; 2006) notes that national identity is one of the ‘deservingness’ criteria alongside control over neediness, level of need, behavioural compliance, and readiness to reciprocate or input. However one can argue that national identity sits uneasily among other ‘behavioural’ criteria of deservingness. For instance given the choice between the two it is easy to predict that people will rank ‘older people’ as more deserving of welfare support than ‘immigrants’ (van Oorschot 2006). However it is more difficult to predict the ranking of deservingness of more multidimensional but arguably more realistic categories such as ‘an older immigrant who worked in the host country for most of their life’ and ‘a healthy native unemployed adult not willing to work’. For instance some of Dwyer’s respondents (2000: 174), albeit perceiving the NHS as an unconditional entitlement, called for curtailing immigrants’ access to the NHS citing mainly a perceived lack of prior contributions by migrants. This suggests that perhaps desert comes before identity in the popular ranking of salience of possible criteria for social justice.²⁷ It would also explain an

²⁶ The poll was commissioned as part of a public consultation on the proposed Borders, Citizenship and Immigration Bill (see Appendix 11). Other conditions of access to formal British citizenship mentioned by British respondents were obeying the UK laws, knowledge of English language, and working and paying taxes for several years. Both the content of the proposed Bill, which contains a range of coercive measures directed towards non-EU migrants, and methodology of consultation exercise were criticised by many non-governmental organisations (e.g. CPAG 2009; Runnymede Trust 2008).

²⁷ Gilens (cited in Kumlin (2007: 377)) looking for an explanation for the hostility towards African Americans as welfare recipients came to similar conclusion: “antipoverty programs that are not seen as

overwhelming lack of support for unconditional basic income proposals both across Europe (Hemerijck 1999) and in Britain (Dwyer 2000: 197), which otherwise would benefit the poorest co-nationals. Furthermore there is evidence that white British respondents were equally harsh in their assessment of other white people, whom they perceived as lacking contribution and “living off” the welfare state (Dench, et al. 2006: 208).

Thus notwithstanding the denial of immigrants’ stake in the host public goods, Bommers and Geddes (2000: 251-252) note that the redefinition of the community of “legitimate welfare receivers” is an ongoing process and over time some immigrant groups do get included in the boundaries of host welfare communities. Arguably the perceived contributions into the common good play a big role in redrawing the boundaries between collectively excluded and included.

Furthermore it has been observed that anxiety over immigrants’ access to welfare is “a part of a broader anxiety about other people free-riding” (Duffy 2004). The perceptions of policy failures, waste and mismanagement of public funds, and of widespread benefit fraud contribute to the disillusionment with the welfare state or, to be precise, with government’s ability to handle the redistribution in a transparent, efficient and fair way (Timmins 2009).²⁸ The dearth of unbiased media reporting on conditions of access to welfare that migrants face, comparative levels of take-up and migrants’ views on welfare tend to fuel public anxiety. In light of this, the public retreats to the minimalist, contractarian version of redistribution, “‘a club’ to which those who have paid are entitled to belong, with rising concerns at ‘outsiders’ and ‘free-riders’” (Timmins 2009: 3).

Thus the empirical literature dealing with ordinary citizens’ views on social redistribution suggests two crucial things. Firstly, in the popular understanding, social justice is seen as an art of striking a balance between contribution and reward, conceptualised as the principle of desert. With the notable exception of healthcare, the principle of need is endorsed only in exceptional circumstances. Consequently upsetting the proportionality of inputs to rewards can lead to public discontent. Secondly, an understanding of appropriate criteria for social justice is shared cross-nationally and cross-culturally to a large extent. Arguably a widespread endorsement of desert as a

rewards for the lazy can gain widespread approval among white Americans, even if these programs are strongly identified with blacks.”

²⁸ According to the 2006 British Social Attitudes survey about 83% of respondents agreed with the statement that “large numbers of people these days falsely claim benefits” (NatCen 2008).

principle of social justice provides the most powerful argument against national identity as the main normative basis for social citizenship.

However this is not to say that the principle of desert is unproblematic. Although adhered to normatively, it may not be deployed in social practice. Also what counts as a contribution and how to rank contributions are contentious issues. The principle of desert can have historic and symbolic roots. It can be ‘inherited’ as a result of contributions of past generations. To that extent it is intertwined with collective identifications. One can argue that host communities tend to perceive the principle of desert not only in its immediate instantiations but in much longer time horizons spanning into the past and into the future of their communities. Thus the principle of desert does not de-problematise redistribution as such. Although social citizenship is ultimately about belonging to a community, the definition of a community remains subjective. Similarly there may be a number of different, but equally ‘moral’, definitions of what constitutes desert, leading to different and sometimes conflictual courses of action.

2.4 Social citizenship and human mobility as agency

In order to understand fully the position of migrants as social citizens in host countries, it is helpful to conceptualise them as social actors. Both social citizenship and mobility are viewed here within the paradigm of agency and are seen as alternative but in many ways interlinked means of satisfying individual welfare needs and thus ensuring subjective wellbeing. An outline of a theory of social action, as it is understood in this research, is followed by insights as to what place host social citizenship takes within migration decision making and how migrants may engage with it.

The concept of agency

Many scholars noted the extraordinary complexity of human actions, defying straightforward classifications and typologies. As Cohen (2000: 74-75) notes “social conduct seems more like poetry than a unitary, natural phenomenon, presenting theorists with ordered rhythms, recurrent meanings, and conventional forms, but no consolidating principle that governs them all”. Arguably it is helpful to understand social action as a result of an ongoing tension between the level of ideal, dealing with the way things ‘ought’ to be, and the level of actual, representing how things are (Dawe 1978). According to Dawe (1978: 375) agency refers to “unceasing attempt to exert

human control through social action over existing institutions, relationships, situations, and systems in such a way as to bring them into line with human constructions of their ideal meanings.” However, human agency has also one fundamental and paradoxical quality. Once the convergence between the ideal and the actual is achieved, the autonomous human agent ceases to exist and becomes the property of a particular type of social order or social system.²⁹ Thus the problem of many sociological theories of social action, such as those of Weber or Parsons, is that they fall into the trap of “the fallacy of the single vision” upon which they become the theories of social order, not of human agency itself (Dawe 1978: 389). Thus according to Dawe (1978: 388) the essence of agency is “in the ambiguity itself”, in the presence of alternative courses of action, possibilities, or conceptions of the social world, in short – in the constant tension between the ideal and the actual. It is in this tension that human autonomy and creativity are the most discernible.

The tension between normative and cognitive levels is particularly clear when one analyses the experiences of immigrants, who enter a completely ‘new’ to them societal system carrying the ‘old’ normative baggage. However, this normative baggage is never static: the values and identifications are upheld, modified or rejected in the process of social interactions. This is why the ideational level, or what can be generically described as ‘culture’, does not determine actions of individuals in a unilateral and deterministic way, as in Parsonsian shared values representing “the common ultimate ends of action” (Parsons 1964 [1937]: 768). Instead, as noted by Znaniecki (1968 [1934]: 37) in his notion of the “humanistic coefficient”, culture is not some kind of supra-human reified entity, but in itself depends on the constant re-enactment in the lived experience of individuals. The outcome of such re-enactments is not guaranteed and is not determined at the outset. Some patterns of actions are reproduced and others are not; all are subject to change. Thus social interactions are of primary importance both for the processual constitution of culture and society and for the processual constitution of the self. Broadly speaking, such an understanding of agency is rooted in symbolic interactionism (Cuff, et al. 2006; Krzemiński 1999) and pragmatist epistemology (Barbalet 1997).

Yet according to Archer (1996) it is important to qualify the view of social structure as an emergent product of social actions by introducing the dimension of temporality

²⁹ Similarly Swidler (1986: 282, 281) notes that culture in settled times tends to “encapsulate” an individual agent, in the sense that it constrains the choice of resources for actions and imposes “the undisputed authority of habit, normality and common sense.”

understood as sequencing rather than simultaneity.³⁰ As she argues: “because ‘structure’ and ‘agency’ are phased over different tracts of time, this enables us to formulate practical social theories in terms of the former being prior to the latter, having autonomy from it and exerting a causal influence upon it. (...) similarly we can speak of systemic elaboration being posterior to a particular sequence of social interaction” (Archer 1996: 694). However just as structures acquire certain emergent properties and are irreducible to people but “pre-exist them”, “people are not puppets of structures because they have their own emergent properties” (Archer 1996: 695). Thus human agency is to some extent emergent rather than predictable, as whilst acting people evaluate and respond to contingencies which can change their definition of a situation and can steer their actions in some unforeseen way.

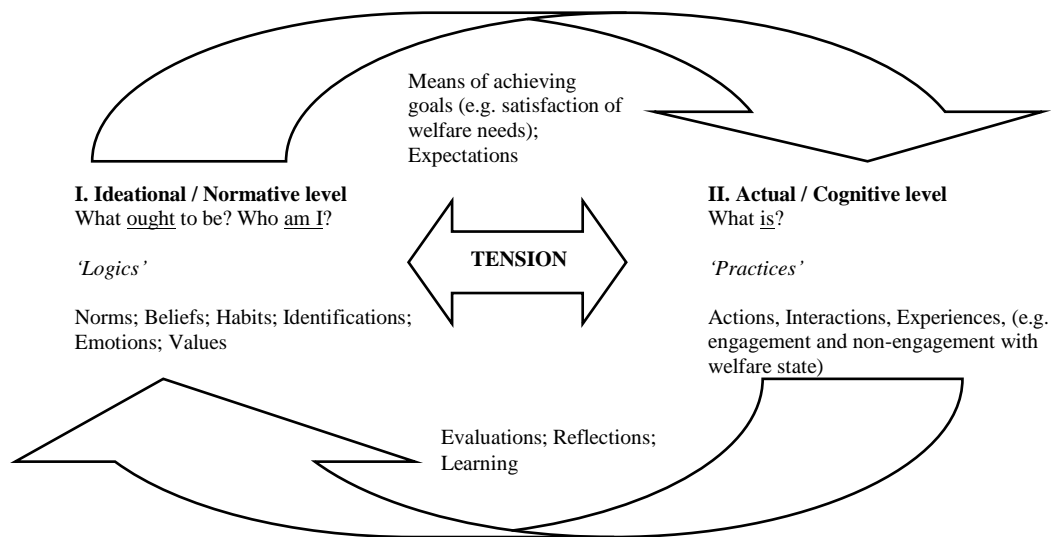
On the micro-social level social actions are often understood in terms of the voluntaristic means-ends model proposed by Parsons (1964 [1937]). Parsons identified several analytical elements applicable to any particular instance of social action. Turner (1985: 69) summarised them as involving “individuals who, on the basis of external conditions and internalized ideas, establish goals and select among means to achieve goals.” Yet Parsons’s model of action received numerous criticisms. For it to be workable one needs to take out the assertion that ‘internalized ideas’ are reified and shared, introduce a very wide definition of ‘ideas’ which includes emotions, and allow for the impact of chance and path dependency on human actions. Furthermore Swidler (1986: 273) argued that “culture’s causal significance [is] not in defining ends of action, but in providing cultural components that are used to construct strategies of action”, in other words ‘ideas’ do not impact individual goals as such, but only the ways of attaining them. Furthermore the focus on the process of social interactions that people engage in whilst pursuing their goals remains crucial as it is during social interactions that actors compare and adjust their definitions of the situation, and consolidate their views about themselves and the social world around them. Such a highly modified means-ends model of social action fits in with the processual (i.e. sequential) interplay of structure and agency outlined above.

The analysis of the interviews with Polish migrants conducted during this research supports the view of agency as an ongoing tension between the ideational and actual

³⁰ A charge of temporal simultaneity leading to a conflation of structure and actions, which prevents the exploration of any causal links between them, is one of the main criticisms of Giddens’s theory of structuration (Archer 1996; Healy 1998).

levels of social perception of reality. The former normative level comprises the norms, beliefs, habits, identifications, emotions, and values, held by particular individuals which impact their ways of thinking and acting as well as their expectations. The latter cognitive level refers to the way individuals experience the social reality – the actual social institutions, relationships and systems – through social interactions and the learning and evaluative processes that such past experiences trigger. As shown in Figure 1, engagement and non-engagement with the British welfare state represent different means of attaining the goal of satisfying welfare needs such as a need for shelter, food or medical attention. I argue that an individual’s choice of either engagement or non-engagement ‘practices’ is to some extent influenced by their perceptions of their own position in British society or ‘logics’. In turn such self-perceptions are shaped and reshaped in the process of everyday social interactions, including interactions pertaining to engagement and non-engagement practices.

Figure 1. Model of agency



Source: own elaboration based on Dawe (1978).

Following advancements in cognitive research, scholars are now inclined towards the view that the norms, values and ideas that individuals hold do not represent a fixed cultural monolith that is acquired during socialisation, as earlier sociologists assumed, but rather they are “complex rule-like structures that constitute resources that can be put to strategic use” (DiMaggio 1997: 265; see also Swidler 1986). Moreover, research evidence suggests that “people retain (and store with default value of “correct”) almost every image or idea with which they have come into contact” until some external stimulus triggers a more effortful evaluation of held schemata (DiMaggio 1997: 268).

However, the precise mechanism of integration of bits of information into “thought styles, stories, logics, paradigms, and ideologies” is not known (DiMaggio 1997: 278). Nevertheless the view of culture as “a grab bag of odds and ends” implies that a person is capable of taking part in “multiple cultural traditions, even when those traditions contain inconsistent elements” and that she is able to “maintain distinctive and inconsistent action frames” adopted in response to a particular situation (DiMaggio 1997: 267-268).

Such an understanding of culture modifies the explanation of empirical misalignments between the set of values that individuals declare to hold and their actions. The tension between “what is and what ought to be” (Marshall, et al. 1999: 349) can be overcome by either attempts to change social reality, for instance through involvement in social movements of various kinds, or by adjusting one’s own values and expectations accordingly along the lines of saying ‘if you can’t change the world, change yourself’.³¹ Each of those responses entails a change. However, there may be also a third agentic response which can be described as simply ‘ignoring’ the gap and continuing with the status quo. As Swidler argues “gaps between the explicit norms, worldviews, and rules of conduct individuals espouse and the ways they habitually act create little difficulty within settled strategies of action. People naturally “ ‘know’ how to act” following the familiar ways of life “for which they have the cultural equipment” (Swidler 1986: 280, 281).

It goes without saying that the course of action that an individual eventually chooses is also influenced by external constraints, for instance set out by immigration and social policy regulations or reception context and by migrants’ individual resources and capitals, including their cultural capital and their overall class position. For instance, policy constraints set clear boundaries of who can do what in the host welfare system (see Chapter 4), whilst cultural capital impacts how successful particular migrants are in exercising their social rights (see Chapter 5). However, structural factors only partially explain individuals’ actions, as one should not overlook an individual’s learning and reflexive capacities. Thus overall social actions are shaped both as a result of voluntaristic (learning, reflection, evaluation) and non-voluntaristic (structural conditions, chance, path dependency) factors.

³¹ The latter explanation has been traditionally preferred by sociologists as an individual’s long-term adjustment to the social system.

Mobility as agency

Mobility (or immobility) can be seen as a means to achieving goals of improved wellbeing and quality of life. For instance, older Europeans may move in search of a better climate, lower heating or housing costs, more beneficial fiscal regimes or higher quality healthcare (Ackers and Dwyer 2002: 186). From this perspective migrants are perceived as active, autonomous and independent agents exercising their choices within the institutional constraints (Ackers 1998).

As spatial movement requires changing societal systems, the status preservation and maintenance of the multidimensional quality of life can be seen as the general motives for staying put, as much as an expectation of status change and improvement in the quality of life can be seen as the main motives for engaging in mobility (De Jong and Fawcett 1981; Haberkorn 1981; Hoffmann-Nowotny 1981). However the achievement of a desired goal depends on the amount of resources – economic, social, cultural capitals and various citizens' rights – one can deploy to this aim. Overall one can argue that undertaking mobility is more costly than staying put. So mobility can be viewed as an asset in itself which is unevenly distributed (Bauman 1998). As mobility is affected by such factors as predispositions to take risks, culture of migration, home and host state policies, and economic resources, migrants represent a selected bunch of their home populations.

If one assumes that migration is a voluntary action then as Haberkorn (1981: 253) argues, the migration decision making process “is similar to the one underlying any other important, conscious, voluntary and goal-directed behaviour.” Yet the topic of migration decision making is notoriously complex. The almost endless number of factors can potentially be taken into account, the latent and subjective assessment of alternatives, the changeable, fluid nature of preferences, imperfect information, and post-factum rationalisations make it extremely difficult to predict both the volume of migration flows and whether or not a particular individual will move or stay put. Furthermore there is often a considerable time lag between contemplating and implementing a move. Thus the migration decision is “the result of deliberations over an extended period of time, implying careful weighing of pros and cons” (De Jong and Fawcett 1981: 46).

The micro level conceptualisations of migration decision making can be divided into two categories, according to how they treat subjectivity. The first category focuses

explicitly on the subjective assessment of goals, means and conditions in the models of decision making. The second set offers explanatory models embedded within the rational choice paradigm treating migrants as economic agents seeking to maximise their monetized goals or minimise risks (Borjas 1999; Fischer, et al. 1997; Massey 1990; Sjaastad 1962; Stark and Bloom 1985) or responding to the status incongruities in their society of origin (Hoffmann-Nowotny 1981). As the latter perspective tests various deterministic models of mobility decisions, it is less useful for this thesis.

Arguably Lee's (1966: 50) push-pull model captures elegantly the complexity of migration decisions by pointing out that "countless factors" can be potentially at work and not only economic ones. Furthermore, the author emphasised the latent and subjective nature of the evaluation of such factors. Lee (1966: 50) argued that "the factors that hold and attract or repel people are precisely understood neither by the social scientist nor the persons directly affected." He emphasised the bounded rationality of individual mobility decisions whilst appreciating the impact of such factors as chance, "erroneous evaluation" (Lee 1966: 51) or emotions. The flexible and generic nature of the push-pull model allows us to consider both home and host social citizenship as either pushing or pulling factors. For instance the host public healthcare system can be seen as a pull factor by some, a push factor by others and an indifferent factor by yet a third category of individuals. Thus the impact of a factor in migration decision making is not deterministic in a sense that the direction of effect is 'always' the same. Instead it is a person's evaluation of a factor that is consequential for the course of action.

The value expectancy model incorporates individual motivations and preferences into micro level migration decision making in a systematic manner (De Jong and Fawcett 1981). The authors define motivation to move (or stay) as "a function of the value placed on certain goals and the perceived likelihood that a behavior will lead to those goals."³² Like in the push-pull model, the subjective specification of personally valued goals allows for a great interpersonal variation of motivations as different people may value differently the attainment of certain goals (such as wealth, status, comfort, stimulation, autonomy, affiliation, and morality). The value expectancy model is not

³² The value expectancy model is expressed algebraically as $MI = \sum_{i=1}^n V_i \times E_i$ where MI is the strength of intention to migrate (to stay), V is the value of a goal, and E is the probability that migration (staying put) will lead to achieving such goal. Thus "the intentions for migration, MI, is a function of the sum of the value-expectancy products" (De Jong and Fawcett 1981: 47).

solely 'psychological', as it incorporates social factors in that the goals are shaped by the socio-demographic and household characteristics, societal and cultural norms and opportunity structures in the destination and origin areas as well as by the availability of information about them. Also Haberkorn (1981: 266) notes that people do not just simply act on their preferences, they also take into account their assessment of the probabilities of attaining their desired goals: "an individual may prefer one particular course of action or location but may eventually do something "contradictory" to that course because he shows a greater confidence in the results of the latter". De Jong and Fawcett (1981: 49-50) subsume the "good welfare provisions" and "stability of employment" under the goal of the "wealth", and "improved housing" and "healthier setting" under the headline of "comfort".

In contrast, the model of "insider advantages" does not allow for subjectivity in goal picking and assessment, although it does stress that migrants function within the confines of bounded rationality and apart from economic goals they may also strive to satisfy needs for security, social integration, acceptance, and self-fulfilment (Fischer, et al. 1997: 51). According to this perspective, people are reluctant to move because of the accumulation of "location-specific" assets and resources, such as cultural or social capitals or welfare entitlements (Fischer, et al. 1997: 75). Thus Fischer and colleagues hypothesise that a well-functioning social security system increases the attractiveness of an area for both the insiders and outsiders. For insiders it reduces "the costs of staying immobile" and increases "the losses in terms of forgone social benefits in case of out-migration", whilst the strength of these effects for outsiders depends "on the extent to which immigrants are free to benefit from the system, which in turn depends on their legal status" (Fischer, et al. 1997: 83). So the impact of the subjective assessment of social security by migrants does not feature in the overall explanation. Instead it is claimed that "the level of social protection (...) may increase the propensity of migrants (non-citizens) to take up residence in this area" (Fischer, et al. 1997: 83).

Such a view implies that host welfare states act as a strong pull factor. The more generous they are, the more migrants they attract, as migrants, being rational actors, are bound to choose a destination which maximises their benefits in this respect. For instance, Borjas (1999: 608) found that the US states offering more generous welfare benefits tend to have a higher clustering of immigrants, thus allegedly acting as "welfare magnets". Yet based on European data this effect was found to be much weaker and

more complex (Brücker, et al. 2002).³³ Furthermore, research evidence suggests that immigrants are no more likely to claim benefits than natives in the same socioeconomic circumstances (Bird, et al. 1999).

The ‘welfare magnets’ thesis can be criticised on many grounds. Firstly, it assumes that prospective migrants have a prior, extensive knowledge of the welfare provision at several destination areas, which is necessary in order to conduct cost-benefit calculation. Yet large datasets used for quantitative testing of this hypothesis usually do not contain any measures of the extent of such knowledge. In contrast, researchers using qualitative methods who are able to obtain such information retrospectively find no evidence to support the ‘welfare tourism’ claim (Ackers 1998). For instance Ackers (1998) in a large-scale qualitative study of intra-European women migrants found that at the time of migration respondents had little understanding or interest in the social policy set-up of destination countries.³⁴ The reasons for moving were multifaceted but mainly employment or family related. Thus Ackers (1998: 268) concluded that “European women do not appear to be ‘shopping around’ for the optimum bundle of social advantages.”

Secondly, the ‘welfare magnets’ approach does not account for the possibility that migrants may assess destination social rights negatively and consider them a push factor. For example Ackers (1998) found that European women who came to Ireland began to realise gradually how particular family and employment policies as well as dominant discourses on gender roles had a negative impact on their reproductive and marital rights and everyday lives. Thus it remains important not to lose sight of the subjectivity in mobility decision making.

Position vis-à-vis host social citizenship

Although the host welfare state does not feature in motivations to move, it may begin to feature in migrants’ lives in the host country. One can assume that in the first instance immigrants perceive the host state’s social rights as merely one of the means of improving their wellbeing. Thus there is always a possibility that some migrants may choose not to exercise their social rights, even if they are formally entitled to them. The

³³ Researchers analysed the European Community Household Panel data gathered during 1994-1996 in 11 EU countries. The situation of non-EU migrants was compared with that of natives. The EU migrants were included in the category of natives (Brücker, et al. 2002).

³⁴ In 1995 researchers conducted in-depth interviews with 341 migrant women residing in 5 EU countries – Sweden, UK, Ireland, Greece and Portugal (Ackers 1998).

reasons for non-engagement may include lack of need, lack of information, incompatibility with held views and rationale of their migration, dissatisfaction with public goods, preference for and availability of alternative means or perception of engagement as too costly.

Some scholars note that the intended length of stay in the host society is consequential for migrants' engagement with the host society (Cwerner 2001; King, et al. 2006; Malmberg 1997; Westin 2000). For instance Roberts (1995) argues that immigrants who come with intention of a temporary stay are less likely to invest in a property, apply for naturalisation, or learn the language than immigrants who come with the intention of a permanent or a long-term stay. In turn the anticipated durations of migration that newcomers arrive with are socially shaped by families and communities in the areas of origin and destination, and the host state's bureaucratic institutions that are designed to implement migration policy. These temporal expectations, shaped within different social contexts, are often at odds with each other, with an individual perspective and with the actual duration of migration. In particular, formally prescribed durations of migration may lock "individuals and organizations into commitments they may later regret" (Roberts 1995: 55).³⁵

In order to engage, migrants have to have some prior information about the effectiveness of social citizenship as a means to achieve their personal goals. Yet various studies point out that immigrants often have little or inaccurate information about the host welfare states. For instance Barnard and Pettigrew (2003) found lack of knowledge of the British welfare system among older members of various ethnic minorities. This included such issues as lack of understanding that benefits are not allocated automatically and that one has to proactively seek information on applicability and availability of various benefits for a particular life situation. The deficit of information regarding the set-up of the British welfare state was also picked up in a large survey of Eastern European migrants in the UK (Spencer, et al. 2007). Researchers found that only about one in five newcomers at the time of arrival had some knowledge about the British healthcare system.³⁶ Furthermore, only about half of new arrivals had some information about the conditions attached to their immigration status and workers'

³⁵ Roberts (1995) built on Merton's (1996: 162) notion of socially expected durations as "socially prescribed or culturally patterned expectations about temporal durations imbedded in social structures of various kinds".

³⁶ The study was based on the survey of 576 migrants from Bulgaria, Czech Republic, Slovakia, Poland, Lithuania and Ukraine conducted in 2004 (Spencer, et al. 2007).

rights. Large proportions of newcomers had considerable problem with fluency in English, especially with written English, which is essential in being able to communicate effectively with benefit authorities. The absorption of information about the welfare system happens gradually and requires time, effort, linguistic and civic competences. The latter embrace so called “people skills” – being assertive, able to fill in forms correctly and knowing the socially accepted ways of interacting with benefit officers (Barnard and Pettigrew 2003: 24). In light of this, newcomers may choose other, more familiar means to satisfying their welfare needs, for instance by purchasing services from the ethnic niche economy or relying on informal care.

Moving to another location, claiming tax credits, using public healthcare services, relying on friends, purchasing goods and services privately represent a toolkit of actions for improving one’s quality of life. Yet these means are unevenly distributed. For instance, some immigrants face more conditions and exclusions from host social citizenship than others (see Chapter 4). Morris (2002) notes that immigrants are civically stratified according to the amount of formal rights granted to them by the host state upon entry and during their stay. In addition to any formal restrictions that migrants face, their substantial rights depend on the reception context. Morris (2002) notes that as the discretion in interpretation of eligibility criteria increases, the substantial rights deficits tend to also increase. Thus service providers, bureaucrats and other people in positions of power influence the delivery of migrants’ rights “through judgements of ‘esteem’ or the process of ‘recognition’” (Morris 2002: 141).

People also have differential access to other types of resources. For instance cultural and economic capitals are linked with one’s class position (Bourdieu 1986). Yet they are vital in the successful exercise of formal social rights and in plugging any social rights’ deficits.³⁷ The class position of immigrants is a peculiar one as migrants tend to refer to two hierarchies of class and prestige anchored in origin and destination areas. For example Eade and colleagues (2006) observed that although around three quarters of their Polish respondents were employed in routine and semi-routine jobs, nearly 60% of them associated their move to Britain with advancing their socioeconomic position and saw Britain as providing them with more chances and prospects than Poland. Moreover nearly 84% of respondents perceived Britain as a predominantly middle class society following the principle of desert and merit, where social mobility is more achievable

³⁷ At the same time social rights were designed to plug the deficits in economic capital that some people experience.

than in Poland (Eade et al. 2006). Yet at the same time the majority occupied the lowest occupational positions in Britain. At first glance such a sense of advancement and optimism of Polish migrants seems unwarranted. Yet it has been shown that Polish migrants have relatively high levels of education (Drinkwater, et al. 2006). As skills and education, being class attributes, are to an extent transferable, Polish migrants can make use of their 'old' class-derived attributes in the 'new' British class system. Although starting at the bottom of the socioeconomic hierarchy, they hope to progress quickly from entry level jobs, given their skills and aspirations.

Social capital, in the form of interpersonal strong and weak ties, does not seem to depend so heavily on one's class position, yet it is also unevenly distributed. The informal care provided by family and friends within and beyond the household is an important alternative to the formal welfare state's solutions. Family and friends are not only the most common sources of information about the host country that migrants rely on (Fawcett 1989; Spencer, et al. 2007), but also a source of practical support and help. As a study of Mexican migrants in the US showed, informal care provided mainly by women often 'spills-over' into the local community infrastructure, which in turn consolidates the settlement (Hondagneu-Sotelo 1994: 148). Thereby women migrants acting as informal carers somewhat unintentionally embrace the role of local social citizens. To that extent, social capital interacts with formal social citizenship structures.

As migration scholars note, care provision within migrant households is inescapably gendered and age-differentiated process (Ackers 1998; Hondagneu-Sotelo 1994; King, et al. 2006; Kofman, et al. 2000). Some women migrants may appreciate moving to a welfare economy based on the male-breadwinner model, which allows them to stay at home and be full-time mothers (Ackers 1998). In the case of a study conducted among Polish migrants in London, this was perceived as offering greater quality of family life than in Poland, where both partners had to work in order to sustain the family (Ryan, et al. 2009). On the other hand, some women migrants who want to work or study may find it difficult to pursue such goals when faced with expensive formal childcare provision and geographically dispersed extended family networks (Ackers 1998). Migrant women turn to their social capital to remedy this situation, for example by bringing over family members, usually their retired mothers to provide hands-on childcare. Such a strategy of "transnational flying grannies" has been noted in studies of Polish, Caribbean and Italian families in the UK (Plaza 2001: 229; White and Ryan 2008; Reynolds and Zontini 2006). It results in a complex web of transnational

intergenerational care-giving and care-receiving practices, whereby (mainly) women are on the move in order to balance the needs of the youngest and oldest members of their extended families in various locations (Baldassar 2007; Ryan, et al. 2009). Ackers (2004) notes that the necessity to give and receive care to and from family members is one of the strongest incentives of mobility. However so far it has been ignored by the mainstream theories of migration (Ackers 2004).

Finally one should note that various means to achieve the wellbeing available to individuals – social rights, money, personal ties, cultural competences – are to a large extent interdependent, as the choice of one of those means automatically opens up some avenues whilst simultaneously closing others, in a kind of path-dependent manner. As Barbalet (1997: 105) explains, referring to the Jamesian theory of action, “a chosen course of action will limit future possible courses of action”. For example, by working illegally a person closes off the possibility of applying for tax credits. Furthermore one can argue that upon engagement, in the long run, the host country’s social citizenship becomes more than just a means to achieving the individual goal of wellbeing. It becomes an all encompassing condition, incorporating an individual into the community.

The nation-state’s perspective on immigrants’ recourse to social citizenship could not be any more different. One can argue that nation-states are generally interested in curtailing the rights of immigrants and in limiting access to their public resources. For instance, Freeman (1986, 2004: 955) argues that migrants as foreigners with social rights “pose a threat to the logic of the welfare state”. The author maintains that migrants benefit the host nation-state only if their migration is temporary, and as long as they do not rely on the welfare state themselves, whereas the availability of social rights to migrants encourages their settlement and leads to an erosion of “the more general normative consensus on which the welfare state is built” (Freeman 1986: 62). From this point of view the extension of social rights to migrants by host state bureaucrats, albeit partial and retaining the function of “an apparatus of surveillance and control” (Morris 2002: 7), remains puzzling.³⁸

Views on naturalisation

Studies exploring migrants’ attitudes towards acquiring formal citizenship of the host country indicate the continuing salience of national citizenship in immigrants’ everyday

³⁸ Guiraudon (2000) argues that in the second half of the 20th century domestic courts of Western European countries played a major role in guaranteeing and extending social rights of immigrants.

lives, contrary to some arguments endorsed in the post-national citizenship literature (Soysal 1994). For instance, Leitner and Ehrkamp (2006) analysed the views of various groups of migrants on acquiring citizenship in Germany and the US.³⁹ They found that the claims of the deterritorialisation and postnationalisation of citizenship are premature as migrants continue to aspire to the citizenship of host country. This is because migrants perceive it as the only way of mitigating the deficit of civil, political and social rights and acquiring protection from deportation, and not because of any shifts in their identifications.

The ambivalent attitudes of immigrants towards naturalisation were captured by Sayad (2004) in his sociology of the immigrant condition. On the one hand, naturalisation is a form of symbolic violence on the part of a host state, and immigrants are sometimes coerced into accepting it without having any other choice. On the other hand, it is sought after because it allows migrants to be “vaccinated against deportation” (Sayad 2004: 253). In the latter sense it is seen as a defence mechanism against juridical threats, which allows immigrants to acquire “elementary and irreducible means of having a legal existence”, to acquire the right to have rights in a place of residence (Sayad 2004: 145). Yet at the same time Leitner’s and Ehrkamp’s (2006: 1625) respondents are “acutely aware that formal citizenship neither erases differences and racism nor guarantees equality”. As Sayad (2004: 253) notes, naturalisation does not change anything either in the realm of migrants’ substantial citizenship or in the realm of their identities.

In contrast, a recent study found that Polish migrants in the UK do not plan to naturalise (Rutter, et al. 2008).⁴⁰ One can argue that this exception only confirms the above rule. Polish migrants do not see a need to apply for British citizenship, because they already possess the powerful legal protection offered by EU citizenship. In this sense they are in a better position than migrants from non-EU countries, for whom the British passport is a matter of “a security, but not an identity” as noted by a Somali refugee interviewed in the same study (Rutter, et al. 2008: 15).

³⁹ The authors conducted an extensive fieldwork comprising 59 interviews with Kurdish and Turkish migrants in Germany and focus groups with 82 Somali, Sudanese, Vietnamese, Cambodian, Mexican, and Central American immigrants in the US. This was accompanied by participant observation and numerous informal conversations (Leitner and Ehrkamp 2006).

⁴⁰ The findings are based on 10 in-depth interviews with Polish migrants in Britain conducted in 2007 (Rutter, et al. 2008).

Migrants may also seek naturalisation because they desire to participate fully in both home and host country affairs, albeit in different ways (Leitner and Ehrkamp 2006). Similar conclusions were reached by Phalet and Swyngedouw (2002: 5), who found that Turkish and Moroccan migrants share with Belgians the social contract type understanding of citizenship in Belgium, but that they also want to retain “a communal type long distance citizenship” with their place of origin. Thus empirical studies suggest that immigrants share with locals the ideas and ideals of citizenship as a participative, contractual, and reciprocal arrangement, but not as a vehicle of national identity. It provides strong support for an inclusive, residence-based but at the same time transnational project of citizenship, the kind of normative proposal advanced by Bauböck (1994; 2003; 2009), which could accommodate migrants’ transnational ties, practices and allegiances with their communities of origin.

Yet the images of highly mobile and emancipated individuals equally engaged in both origin and destination countries were criticised as “greatly exaggerated” (Leitner and Ehrkamp 2006: 1629). Furthermore Phalet and Swyngedouw (2002: 19) found that allegiances to the place of origin lack “a full participative dimension”, so multiple allegiances do not constitute uniform sets. This begs the question whether dual or transnational social citizenship is possible in practice. Neither postnational (Soysal 1994), transnational (Bauböck 1994) or diasporic (Laguerre 1998) citizenship proposals discuss explicitly how social rights can be exercised ‘postnationally’, ‘transnationally’ or ‘diasporically’.⁴¹ Some research results cast considerable doubt on the possibility of dual social citizenship even within an otherwise highly integrated space of European Union. For instance O’Reilly (2007) researched the everyday lives of British migrants living in coastal areas of Spain and noted that mobile Europeans still have to determine their country of residence for the purpose of paying tax and national insurance contributions and making claims against the welfare system. The exercise of social citizenship is closely tied to a place of residence, which limits its multiple forms. On the other hand although the locus of British migrants’ social citizenship was in Spain, the author found that her respondents were still perceived as members of the British nation-state both by the local Spanish administration, local population and even by themselves.

⁴¹ Bauböck (1994; 2007) focuses primarily on restructuring the universal political franchise in the context of multiple memberships and multilayered polities. Soysal (1994) focuses on the crossnational comparison of migrant incorporation policies rather than the practical exercise of rights. Laguerre (1998) offers a case study of Haitians in the US and examines ethnic businesses and diasporic institutions of community media, schooling and politics.

Thus overall migrants are trapped in an ambiguous “mobility-enclosure dialectic” (O’Reilly 2007: 277).

As far as a narrow understanding of social citizenship is concerned – solely as access to welfare rights – one can conclude that with some exceptions such as pension entitlements dual social citizenship is not possible (see also Chapter 4). However if one takes a wider definition of social citizenship – as membership of a multigenerational welfare community with a collective past and future – arguably emigrants retain the moral legitimacy to claim membership in their home community as well as in their host one. In other words they remain “the stakeholders in a particular polity” and retain the right “to be admitted to that polity” (Bauböck 2009: 28). To that extent dual social citizenship is possible, however it remains latent unless migrants decide to put it into action.

2.5 Summary

In the context of the immigration debate, the principles behind the status of the social citizen, her rights, duties and allegiances have received revived attention. Researchers of migration began to explore the conceptual and empirical field at the crossover of immigration and social citizenship discourses, in particular focusing on the scope of migrants’ social rights in the host countries and the implications of intra-European migration flows for European citizenship (Ackers 1998; Ackers and Dwyer 2002; Bommers and Geddes 2000; Morris 2002; O’Reilly 2007; Schierup, et al. 2006). Yet one can argue that more work needs to be done to map the attitudes towards social citizenship of ordinary citizens – both settled and mobile ones.

This literature review exposed a dearth of empirical data on attitudes towards citizenship by ordinary people engaged in mobility. This thesis in particular aims to fill the latter lacuna in migration research by exploring the experiences and attitudes towards British social citizenship of Polish migrants residing in Britain under the auspices of EU citizenship. This study offers a fresh conceptual perspective of viewing social citizenship and mobility as human agency. From this perspective migration is not seen as ‘an end in itself’, a dependent variable that needs to be explained, but rather as one of many potential means leading to the achievement of various goals, which motivate individuals to engage in particular actions.

The reviewed public opinion research indicates a shift from universality towards a more conditional, contractual view of citizenship. Yet at the same time, in the light of market failures, large sections of European societies still look to the state to ensure their individual wellbeing. One can argue that whatever turn the debate takes, one should not discard the notion of social citizenship too hastily. One should remember that social rights as a constitutive element of modern citizenship are not just there to ensure individual welfare, but that they ultimately become “details in a design of community living”, the “perpetually moving” target of collective wellbeing (Marshall 1950: 59). In light of this duality, Marshall (1950: 59) argues that “a fair balance between collective and individual elements in social rights is a matter of vital importance to the democratic socialist State”. In that sense, social citizenship is shorthand for social inclusion, engagement and participation. It provides a “space of social interaction” (Ferrera 2005: 37), where social integration in a sociological sense takes place. Thus the debate about social citizenship is essentially a debate about equality, wellbeing, and inclusion and by definition about its opposites – inequality, poverty and exclusion – and as long as these issues remain compelling, whatever terms are used in the academic and popular discourses, the debate is likely to continue.

Chapter 3. Researching social citizens. An application of the grounded theory method

This chapter contains a discussion of the methodological premises underpinning this research and a description of the grounded theory method used to research the social citizenship practices of Polish migrants in London.

3.1 Researching agency. Epistemological concerns

Some migration scholars argue for a greater emphasis on the investigation of human agency in societies touched by mobility, “on real people moving in real space” (Castles 2007; Favell 2008: 272). However if one adopts a bottom-up perspective on social citizenship and migration as a means to achieve certain individual goals, one is bound to come across the methodological caveats surrounding the research of human agency.

One way of analysing agency is “in terms of its subjective (existential or phenomenological) meaning to the actor or actors involved” (Cohen 2000: 74).⁴²

However, if the essence of action lies in its subjective yet socially constituted meaning, then how can it be grasped by a researcher and with what methodological tools? The methodological concepts such as Weber’s ‘verstehen’ or Znaniecki’s ‘humanistic coefficient’ offer some heuristic guidance as to how to proceed with such a task. For instance, Weber (1978: 8) argues that achieving a so called “explanatory understanding” requires recognition of motives that drive individuals in a particular situation, which can become more apparent upon the examination of all elements of a situation that are meaningful to the actors.⁴³

Similarly Znaniecki argued that the aim of the researcher is to “know the meaning of the objects this agent is dealing with” and to identify obstacles and “perturbing factors” that derail agent’s actions and lead to unintended consequences (Znaniecki 1968 [1934]: 57, 69). According to Znaniecki, sociology cannot answer why a particular person has a particular set of values and attitudes, or acts the way she acts, but instead should view activity “with reference to the system which it tends to construct” and “whether its

⁴² The focus on subjective meaning of social action can be traced back to the sociology of Max Weber. Weber (1978: 4) defined social action as one in which the actor’s “subjective meaning takes account of the behavior of others and is thereby oriented in its course” and saw the causal explanation of social action and its consequences as the main task of interpretative sociology.

⁴³ More precisely it requires a “rational understanding of motivation, which consists in placing the act in an intelligible and more inclusive context of meaning” (Weber 1978: 8).

results are what they were intended to be; and if not, then why not” (Znaniecki 1968 [1934]: 67-68). In short, sociological understanding of human agency requires tracing how individuals formulate and modify the meanings of objects, appreciate the obstacles, and communicate with others: how they define their situation with reference to a particular cultural system (Thomas and Znaniecki 1927 [1918-1920]): 68).⁴⁴

Such theoretical concepts suggest that a researcher should reconstruct a context of action in order to grasp its meaning to individuals. In that process one should clearly distinguish the normative and cognitive levels of individual experience. This is particularly important because in practice there is often a discrepancy between what people think and what people do (Cohen 2000: 82). The progress in cognitive psychology suggests a greater emphasis on the creative, generative, selective and sorting functions of human minds and consequently does away with the unidirectional, monolithic and deterministic view of culture as a moral compass for action (Bandura 2001; DiMaggio 1997). Such “discrepancies between belief and action” inevitably complicate the researching of human agency (Strauss and Corbin 1998 [1990]: 32).⁴⁵

Assuming that social action is penetrable to analytic gaze the question remains how to identify and generalise significant patterns of meanings (Cohen 2000: 74). The sociological advice is to look for inter-subjectively shared meanings or shared ways of conduct (Cohen 2000). In practice, this is done by comparing cases in search for similarities and dissimilarities. However, analysing meanings requires interpretation by the researcher and hence there is always a danger of imposing the researcher’s own meanings upon the analysed actions. Furthermore, sociologists are under pressure to find generalisations, patterns and uniformity, in places where it has been shown that even the behaviour of the same individual can be highly contextual (Uhlmann 2004).⁴⁶

These are some of the caveats of studying agency. Due to the danger of misinterpreting subjective meanings it is important to listen carefully to what research participants communicate. An example of migration research tackling migrants’ agency in such a

⁴⁴ For Thomas and Znaniecki (1927 [1918-1920]: 68) the definition of situation represents “the more or less clear conception of the conditions and consciousness of attitudes” which is “necessary preliminary to any act of the will, for in given conditions and with a given set of attitudes an indefinite plurality of actions is possible, and one definite action can appear only if these conditions are selected, interpreted, and combined in a determined way and if certain systematization of these attitudes is reached, so that one of them becomes predominant and subordinates the others.”

⁴⁵ Apart from complications in cognitive dimension, other complex factors that bear heavily on human agency are emotions and the drive for power (Cohen 2000; Hałas 1999).

⁴⁶ Arguably a pressure to generalise is particularly high in research projects where a sole ethnic or migrant group is a subject of the research, as in this thesis.

perspective is a study of intra-European mobility of women conducted within the so called “action-research” framework (Ackers 1998: 23). This study conveyed participants’ concerns as close as possible, even if some of them ran contrary to the prevailing academic, in this case feminist, discourses.

3.2 Research questions, definitions and research design

Reflection on these epistemological caveats accompanied various stages of the research process, aiming to explore Polish migrants’ experiences and perceptions of British social citizenship. In order to fully map the context and the content of their actions, a number of research questions pertaining to migrants’ experiences, views and decisions in areas of welfare benefits, healthcare and social housing, were formulated at the start of the research.⁴⁷ In the course of analysis these questions were condensed into two main research questions:

1. What are the consequences of the UK and EU social policy set-up for eligibility of Polish migrants to UK social rights, specifically to non-contributory welfare benefits, social housing and healthcare? (Chapter 4)
2. What are the terms and forms of engagement and non-engagement with British social citizenship, as perceived and enacted by participants of this research? (Chapter 5)

As the policy set-up is an important condition impacting migrants’ engagement with the UK public services, it is important to review the scope of formal social rights available to Polish migrants in the UK. Yet the notion of engagement also embraces the issues relating to the substantiation of social rights of Polish migrants in the UK. It includes the normative and evaluative views about welfare, migrants’ perceptions of their status, rights, duties and identifications in Britain, and everyday interactions with various service providers and fellow (social) citizens. Thus overall, the thesis offers an account of the causes, conditions and consequences of Polish migrants’ engagement and non-engagement with social rights in Britain.

⁴⁷ The initial research questions were: What are the consequences of current UK and EU social policy set-up for actions of Polish migrants? What are the experiences of Polish migrants in exercising their rights to British welfare benefits, healthcare and social housing? What is Polish migrants’ own take on their social citizens’ status, rights, duties and identifications in Britain? How does their social citizenship status in Britain interact with their mobility decisions?

Some terms used throughout this thesis would benefit from specification. The **participants** or **respondents** are Polish migrants who possess formal Polish citizenship and who came to the UK in the 1990s and 2000s, in particular after EU enlargement in May 2004.⁴⁸

Throughout the thesis I use the notion of **citizens** mainly in a sociological sense. This means that I treat participants as ‘qua-citizens’ from the moment they arrive in the UK. This is a heuristic assumption that enables an assessment of how far the actual civic identifications and experiences of participants deviate from the hypothetical full inclusion in the British citizenry. However the participants are not treated here as though they ‘ought to’ conform to some normative vision of the host citizenship. Instead the focus is on the subjective construct of citizenship communicated by participants. So as long as individuals subjectively identify with some communities for the purpose of this thesis they are treated as citizens of those communities, worthy of all the citizenship rights and above all of the recognition as equal members by others (Somers 2008). As a result **social citizenship** and **social rights** refer to both a set of enabling entitlements and a wider sense of membership in a welfare community.

The **British welfare state** is operationalised as the healthcare, social housing and non-contributory welfare benefits systems. Arguably, these three welfare subsystems deal with some of the scarcest and most expensive public resources, the redistribution of which is likely to be contentious as far as the entitlements of persons perceived as outsiders are concerned.

Finally, the **practices** refer to the social actions of individuals who anticipate, reflect and evaluate, make decisions and choices, face constraints and opportunities in order to get closer to their goals. Not only the content of social actions is salient here – the meaning of such actions for individuals – but also the forms in which practices are produced and reproduced.

In order to address the posed questions I utilised several research techniques. In particular to map the eligibility of Polish migrants to social entitlements in Britain I carried out desk research and analysis of secondary data sources such as the relevant EU and UK legislation, case law, government reports, official statistics in the form of

⁴⁸ The participants were also Polish by ethnicity, apart from one participant who identified himself as Silesian.

administrative data and the UK Labour Force Survey datasets, as well as secondary literature on these sources.

Mapping the subjective construct of social citizenship and migrants' experiences demanded a careful choice of method, which needed to be both flexible and fruitful. Phalet and Swyngedouw (2002) who have ventured into this terrain equipped with a questionnaire noted the limitations of this tool. They concluded that the survey method, due to "the imposed format of categories and questions, the abstraction of momentary self-presentations, and the averaging of individual responses", misses the "spontaneous discourses, interaction contexts, or individual particularities" (Phalet and Swyngedouw 2002: 13). In light of this I opted for in-depth, semi-structured interviewing as the main technique of gathering primary data. In addition I engaged in a period of participant observation and carried out a follow-up online questionnaire.

Castles (2007: 353) points out that migration studies are "intrinsically interdisciplinary". This research was no exception as the posed research questions cross the disciplinary boundaries from the main anchoring point of sociology into social policy, law, and political science. The diversity of data sources utilised in this research was integrated under the umbrella of an overarching methodological framework of grounded theory (Glaser and Strauss 1967). It offers a set of flexible principles for producing, integrating, and analysing mixed-source, mixed-method and cross-disciplinary data, whilst remaining firmly emplaced within the interpretative sociology paradigm (Charmaz 2006; Strauss and Corbin 1998 [1990]).⁴⁹

3.3 Grounded theory premises

The grounded theory method aims to understand "what actual situations are like" (Cuff, et al. 2006): 122). Following an analysis of gathered material it proposes empirically grounded theoretical conceptualisations of studied phenomena. Since its formulation in the 1960s as a qualitative method with a positivist twist it became a widely used and hotly debated method of interpretative sociology (Glaser and Strauss 1967). The split between its two founders added to the relentless debates about the 'correct' ways of doing GT research (Heath and Cowley 2003; Kelle 2005). Arguably, due to the

⁴⁹ For instance the "interplay between qualitative and quantitative methods" of data collection and analysis is encouraged within the grounded theory, if it is truly theoretically illuminating – as when one wants to capture the difference between beliefs (via in-depth interviews) and actions (questionnaires, observation) of individuals (Strauss and Corbin 1998 [1990]: 31).

vagueness and flexibility of GT premises, it remains difficult if not impossible to learn the grounded theory method “from a book” (LaRossa 2005: 840).

In this research I followed a constructivist reworking of grounded theory, which departs from its positivist roots (Charmaz 2006). Charmaz (2005) rejects the assumption of transparency and neutrality of a researcher and research tools and acknowledges the generative nature of language and social interactions for research outcomes. This leads to the need to be reflexive about the role of the researcher and to retain sensitivity to the social settings in which the research is undertaken. Thus constructivists argue that “no analysis is neutral” despite our utmost and commendable attempts to remain objective (Charmaz 2005: 510). However this does not invalidate grounded theory as such, instead it enriches it by bringing it in line with the post-modern turn in social science methodology (Charmaz 2005). The GT ‘updated’ in this way offers new powerful ways for exploring social reality and in particular such abstract and normative constructs as social justice or citizenship (Charmaz 2005).

Grounded theory can be succinctly defined as “a set of flexible analytic guidelines that enable researchers to focus their data collection and to build inductive middle-range theories through successive levels of data analysis and conceptual development” (Charmaz 2005: 507). Thus it denotes both a particular process of sociological enquiry (a method) and a product of that process (a theory) (Charmaz 2006). Some scholars argue that researchers “should set aside ‘doing it right’ anxiety” and, provided they adhere to a few crucial principles, should find their own cognitive style and way of achieving “the balance between interpretation and data” (Heath and Cowley 2003: 148-149). The core, closely interrelated principles of grounded theory are theoretical sampling, constant comparison, and emergence or discovery of theory from data (Heath and Cowley 2003).

In adopting the theoretical sampling procedure, a type of purposeful sampling, a researcher aims to discover new types of situations, producing variability in the phenomenon under study until a certain point of saturation has been reached (Coyne 1997).⁵⁰ Thus researcher’s decisions on where to go next looking for data are guided by a constant comparison with existing data in a process of gradual construction of an emerging theoretical framework (Konecki 2000). This means that “the analyst who uses

⁵⁰ Although all theoretical sampling is purposeful, not all purposeful sampling is theoretical, i.e. guided by the concepts that emerge from an analysis of initial materials (Coyne 1997). For instance, a so called snow-ball sample is not a theoretical sample.

theoretical sampling cannot know in advance precisely what to sample for and where it will lead him” (Glaser 1978 quoted in Coyne 1997: 624). New cases are added to the sample to develop dimensions of emerging, theoretically important, categories.

Theoretical saturation of the sample – the decision when to stop collecting data – is linked with the simultaneous coding of data already collected, in particular with a saturation of important concepts with indicators. As LaRossa (2005: 841) explains “when a researcher got to a point where the addition of another indicator to those already grouped under a concept did not appear to generate significantly new insights about that concept, then, in GTM terms, the concept is theoretically saturated. A theoretically saturated concept essentially is a well grounded concept.”

The constant comparison refers to the mode of working with collected data. This is best described as involving an abductive reasoning – usage of induction and deduction in a cyclical pattern. As Charmaz (2006: 181) notes “GT involves taking comparisons from data and reaching up to construct abstractions and simultaneously reaching down to tie these abstractions to data.” This is aided by the multistage coding process. Concurrency of data collection, coding and analysis ensures that cycles of inductive and deductive thinking are repeated as the researcher formulates interim hypotheses upon comparing data with data and codes with codes, which guide her to the collection of more data. Such cycles are repeated until the collection of data does not generate new insights and the concepts are sufficiently multidimensional and developed, in short grounded.

Finally, the principle of emergence or discovery of theory is arguably one of the most disputed premises of grounded theory and a major reason for the rift between its founders (Kelle 2005). Strauss and Corbin (1998 [1990]: 34) argue that “emergence is our approach to theory building, a researcher cannot enter an investigation with a list of preconceived concepts, a guiding theoretical framework, or a well thought out design. Concepts and design must be allowed to emerge from the data”. Yet Glaser criticised the Straussian version of GT as forcing a theory upon data rather than allowing it to emerge from data and proposed his own way to ensure the emergence (Glaser 1992).

Neither stance seems satisfactory from the constructivist position. At the final stages of analysis the role of a researcher is greater as she assesses and selects important themes and interprets them to build a comprehensive picture of studied phenomenon. Thus Charmaz (2006) claims that grounded theories neither ‘emerge’ nor are ‘discovered’ from data independently of a researcher. She claims that “we construct our grounded

theories through our past and present involvements and interactions with people, perspectives, and research practices” (Charmaz 2006: 10).⁵¹

The principle of the gradual construction of GT also means that the research process does not follow the usual pattern of setting a hypothesis at the start and testing it during research. There is no a priori categorisation of variables into ‘dependent’ and ‘independent’. Instead an explanatory hypothesis, a proposition that should be falsifiable and could be tested in future, constitutes an end product of the GT method. This proposition usually takes the form of a causal explanation of studied phenomenon and is offered in the form of a coherent analytical story capturing both structure and process of the phenomenon. The latter is referred to by Strauss and Corbin (1998 [1990]: 128) as “the paradigm” explaining “conditions” of a phenomenon, “actions/interactions” that agents are involved in and “consequences” or outcomes of such actions or inactions. Charmaz (2006: 126) describes such an end product as “interpretive theory”, offering “imaginative understanding” of the studied topic rather than its explanation, and assuming “emergent, multiple realities; indeterminacy; facts and values as linked; truth as provisional; and social life as processual.”

These grounded theory principles had a bearing on the way my fieldwork was conducted. One can argue that by advocating that research is generally a ‘messy’ process rather than a linear progression to the clearly defined end, GT is particularly suitable as a method for many PhD projects in social sciences. The inevitable twists and turns during the research project are not only allowed but remain a constitutive, definitional element of grounded theory.

3.4 Interviewing Polish migrants in London

I began my research project with the aim of studying Polish migrants’ integration in the UK. The idea was to approach the issue of integration from a micro-sociological point of view by showing migrants’ perspective and focusing on social action and everyday

⁵¹ On balance, this research is closer to the Straussian version of grounded theory. This is not so much because of the strict adherence to the Straussian proposal (Strauss and Corbin 1998 [1990]) but because there are many aspects of the Glaserian version (Glaser 1978; Glaser 1992) which have not been endorsed in this research. Firstly, Glaser (2002) is critical of the constructivist reworking of grounded theory. Secondly, the Glaserian assertion that “all is data” is not followed (Glaser 2002: 1). I do not assign the same level of importance in revealing social citizenship practices of Polish migrants to such data sources as legislation, official statistics or my own thoughts and observations – and hence I do not code them in the same way as in-depth interviews, as Glaser advocates. Furthermore, I pay particular attention to the accuracy of narratives by meticulously recording, transcribing and coding all interviews, which Glaser finds counterproductive (Glaser 1992: 19-20, 42-43).

life. I planned to focus on migrant households as I assumed that by being a crucial form of organisation of everyday life they will have some bearing on the integration process. However, after initial research I concluded that the notion of ‘migrant integration’ is problematic in itself (Joppke and Morawska 2003).⁵² It is a “loaded notion” (Sayad 2004: 221-224). One can argue that despite the admission by scholars of migration that “integration is a two-way process: it requires adaptation on the part of the newcomer but also by the host society” (Castles, et al. 2003: 11), it is devoid of a strong human agency dimension. This is in contrast to the notion of citizenship, and in particular of social citizenship, which combines both the strong praxis element dealing with tangible aspects of everyday life – the satisfaction of basic human needs – and an abstract notion of social collectivity and welfare community. Thus I turned to social citizenship as a guiding theoretical concept of this research.

Recruitment and interviewing

Bearing in mind that the aim of this study was to map Polish migrants’ attitudes to British social citizenship, it was important to ensure the maximum heterogeneity of the sample. Polish migrants in the UK are by no means a homogenous group as they are differentiated by gender, age groups, family circumstances and education levels (see Appendix 15). Furthermore in order to capture as many attitudes as possible, one had to reach individuals in different family and employment situations and of different persuasions. Thus the diversity of the sample had to be assured in order to safeguard against homogenising conclusions.

Initially I followed the line of an assumed variation of social citizenship status by household types. However early in the interviewing process it transpired that it is a person’s family unit type rather than household that has more bearing on their position vis-à-vis UK welfare system.⁵³ So instead I aimed for a diversification of my interviewees by family unit type to include single people, childless couples, including

⁵² This is because it is sociologically unsustainable. As Joppke and Morawska (2003: 3-4) note: “immigrants, much like everyone else, are always excluded and included at the same time, excluded as whole persons and included as sectoral players or agents with specific assets and habitual dispositions within specific fields or systems. (...) In this view, from the territorial nowhere of macrosociology, the non-integrated immigrant is a structural impossibility, because from the day she sets foot in the new society, she is always already “integrated” and engaged in certain fields and systems, be it the (in)formal economy, residential area, family, or ethnic group.”

⁵³ However, with regards to the operation of social networks, informal care and eligibility for some benefits, the household type remained important. So in the end I have captured, where possible and relevant, information about both a family unit and a household type.

same sex couples, couples with children and single parents.⁵⁴ Furthermore in the course of the research an individual's labour market position appeared relevant for both eligibility to benefits and housing and the level of need. So in addition I tried to diversify my sample by recruiting people who occupy different positions in the labour market: employees, self-employed, unemployed, unable to work temporarily due to health problems, housewives, retirees etc. Thus the sample is constructed in order to capture various properties of the core category – the engagement with the British welfare state.

The participants were recruited during 2007 and 2008 at various public gatherings of Polish migrants in London.⁵⁵ Upon obtaining prior permission from gatekeepers, I distributed a research leaflet and invited people to take part (see Appendix 1). Thus each participant was effectively approached anew. There were only two exceptions to this recruitment strategy. Firstly, in the case of a hard-to-reach category such as same sex couples living together I utilised a snowball technique, which started rolling when first contact was established via a Polish lesbian networking website. Secondly, in order to recruit individuals who found themselves in an extremely difficult financial situation and faced homelessness, I engaged in a period of participant observation and volunteering at a support and advice centre for migrant workers run by a charity organisation. The prolonged presence at the centre allowed me to build a rapport with individuals using the service.⁵⁶

During the fieldwork I had to make numerous decisions such as 'whom to interview next' and 'which questions to focus on during the interview'. As a result the interview schedule was revised several times. I began the fieldwork by asking about a broad range of participants' experiences in Britain whilst gradually focusing on the areas of welfare benefits, social housing, and healthcare. Furthermore I included questions which tackle not only the level of everyday actions and experiences, but also the evaluative views of public services and general attitudes towards redistribution (see Appendix 2). The

⁵⁴ I use LFS definitions of household and family unit in this research. According to the LFS "a family unit can comprise either a single person, or a married/cohabiting couple, or a married/cohabiting couple and their never-married children who have no children of their own living with them, or a lone parent with such children". In turn a household may contain one or several family units and is defined as "a single person, or a group of people living at the same address who have the address as their only or main home. They also share one main meal a day or share the living accommodation (or both)" (ONS 2008f: 4).

⁵⁵ I recruited respondents at a support centre for migrant workers, a mother and toddler group, a Saturday school, two job fairs organised by London based Polish newspapers, a series of information events for newcomers organised by a Polish church, and a local authority outreach event.

⁵⁶ I visited the centre twice a week during January and February 2008, during which time I conducted 12 one-to-one interviews with the users of the service.

evaluative and normative opinions offered by the interviewees were intertwined with, rather than neatly separated from, various ‘stories’ and ‘events’ reporting the experiences.

Also I had to weigh the pros and cons of interviewing family members together or separately. I decided to interview family members together when it was possible and when they preferred to be interviewed that way. Although not without its disadvantages, joint interviewing does not introduce an atmosphere of anxiety among couples, who otherwise would be asked the same questions separately and may feel that their relationship is ‘tested’ for honesty or robustness (Morris 2001; Valentine 1999).

Conducting the interviews raised many issues such as managing power imbalances, maintaining a rapport, and becoming aware of my own social identity, as many participants studied me at the same time as I was studying them. All in all, between February 2007 and May 2008 I conducted 50 in-depth interviews with Polish migrants residing at the time in London. 39 interviews were one-to-one and 11 were conducted with 2 and in one case 3 individuals present. Thus 62 participants took part in this research in total and shared their experiences and views (see Appendix 3). All interviews were conducted in Polish, and all but one was recorded.⁵⁷ The interviews were transcribed and imported into the qualitative analysis software Atlas.ti.

Participants’ characteristics

Apart from the narratives I also collected basic socio-demographic and socioeconomic characteristics of all participants using a post-interview form (see Appendix 2). Before arrival in London participants lived in various rural locations, small towns and cities in Poland in all but one of sixteen Polish voivodships (see Appendix 4).⁵⁸ At the time of interview participants lived in 22 different London boroughs (see Appendix 5). The sample was differentiated by gender (33 women and 29 men) and by age (the youngest participant was 23 years old and the oldest – 70). At the time of interview the overwhelming majority of participants (56 out of 62) had lived in the UK for up to 5 years. 27 participants had previous experience of labour migration to other countries, including previous labour migrations to the UK.⁵⁹ Interestingly, the majority of such

⁵⁷ One interview was not recorded upon participant’s request, but notes were taken during the interview and subsequently coded.

⁵⁸ There was a notable absence of participants from Opolskie voivodship.

⁵⁹ The most common destinations for previous labour migrations were the UK, the US, Germany, France, Italy, and Norway.

“mobicentric” individuals were men (Haberkorn 1981: 266) (see Appendix 6, Table 7-9).⁶⁰

Although the main motive of coming to the UK was economic, participants had different specific aims of migration. Some participants, who were in their 20s and 30s, came to the UK to earn money to pay for studies back in Poland, and others to save for investment in business or property in Poland. A discernible number of participants wanted to earn money to pay off consumer debts, mortgage, or debts incurred as a result of the collapse of family businesses in Poland. Other predominant motives were the inability to find employment in Poland or dissatisfaction with employment conditions such as low pay, long hours, short-term contracts, and lack of appreciation by bosses, which made some participants feel overburdened and undervalued. Others came to the UK because they wanted to establish households independent of their parents, and the ratio of earnings to cost of living in the UK seemed more appealing than in Poland.

However the economic motive was often not the sole one. Some respondents followed their partners, who have already established themselves in the UK. Often a couple took the decision of relocation together and both partners moved within several months of each other, usually the woman following the man. Yet in three cases men followed their female partners to the UK, including one participant following his ex-partner to England hoping to maintain contact with his children in such a way.

Apart from economic reasons, a distinctive motivation characterised gay and lesbian participants. Some of them spoke of the lack of public acceptance of homosexuality in Poland, fear of aggression in public places, and practical, everyday problems of living as a homosexual couple in Poland. Various participants also spoke about a desire to see the world, experience life in a different country, learn the language, escape various emotional issues in Poland and for a ‘fresh start’ in a new place. For some participants collisions with civil and criminal justice systems in Poland and other countries or avoidance of compulsory military service in Poland may have been additional motives of coming to the UK.⁶¹

A distinctive non-economic motivation characterised the majority of older participants (mainly women), namely those who retired in Poland and came to help look after their

⁶⁰ In one case of extreme hypermobility a male participant worked in eight different countries over the course of two decades before arriving to the UK.

⁶¹ However in 2009 Poland abandoned compulsory conscription and reoriented its military forces towards the professional army model (Day 2008).

grandchildren in the UK. This freed up precious time for their adult children (also mainly women), who could devote it to paid work and/or studies. Some of such older persons were widowed or separated from their partners in Poland and had no close or dependant relatives in Poland. When this was not the case, they were engaged in intermittent commuting by sharing their care time between Poland and the UK.

At the time of interview 22 participants could not specify exactly how long they were going to stay in the UK, whilst 23 planned to stay long-term. The rest planned to stay between 1 and 10 more years (see Appendix 6, Table 10). However as interviews revealed the planned duration of stay was subject to constant revision in light of new circumstances. 9 participants also contemplated further migration to countries such as Australia, Canada, France, Norway and the US.

As far as educational attainment is concerned, 31 respondents had a university degree, 28 participants had a secondary education and 3 participants had elementary education.⁶² As far as declared level of knowledge of English is concerned, 22 participants knew English to an advanced level, 17 – to an intermediate and 23 at the basic level or did not know English at all. There were more persons with university degrees and with an advanced knowledge of English among female compared to male participants (see Appendix 6, Table 12-13).

Family circumstances of migrants were also diverse and complex. 28 participants formed a one person family unit in their households in London, 18 were couples without dependent children (including 5 participants who resided with same sex partners), 13 participants were couples with dependent children, and 3 were single mothers with dependent children. Among women participants there were fewer persons forming a one person family unit than among men. However this categorisation conceals an even greater diversity of family circumstances of participants. For instance, there were a number of extended family members forming households, consisting of either inter-generational family units (i.e. grandparents, parents and children living together) or intra-generational family units such as co-residing siblings with their partners and/or children. Furthermore the family units, which participants formed in the UK, do not always reflect the person's official marital status and whether such a person has dependent children or not. This is because some respondents (mainly men) lived apart from their spouses and their dependent children. Often this was the result of relationship

⁶² In this case elementary education corresponds to completion of 8 years of education, secondary – to 12, and higher – to 15 (bachelor's degree) or 17 (master's degree) years of education.

breakdown, but in other cases simply a result of temporary residence in two different places (see Appendix 6, Table 14-16).

Finally, as far as the labour market status of participants is concerned, 21 participants were full-time employees, 3 were part-time employees, 14 were self-employed, 13 participants were looking after their households (this included 9 housewives, 3 'housegrannies' and 1 'housegranddad'), and 11 were unemployed. Furthermore, 7 participants had serious health conditions such as cancer, heart disease or serious injury, requiring ongoing medical attention and/or limiting the work they could do (see Appendix 6, Table 17, 19).

Thus participants constituted a diverse group of people differentiated by age, gender, labour market position, educational attainment, family unit type and health condition. So it is not surprising that they were also differentiated by the level of engagement with the institutions of the formal welfare system in London. Participants represented a mix of those, who claimed welfare benefits, were social tenants (or applied for council tenancy) and relied heavily on the NHS healthcare and those who had no recourse to these public services (see Appendix 6, Table 19-25). However, as is discussed in Chapter 5, the reasons behind the take-up of entitlements or lack thereof were not just down to the simple impact of socioeconomic characteristics, but were more complex and multidimensional – and included evaluations of services, normative views on welfare, and subjective self-perceptions of one's position in Britain.

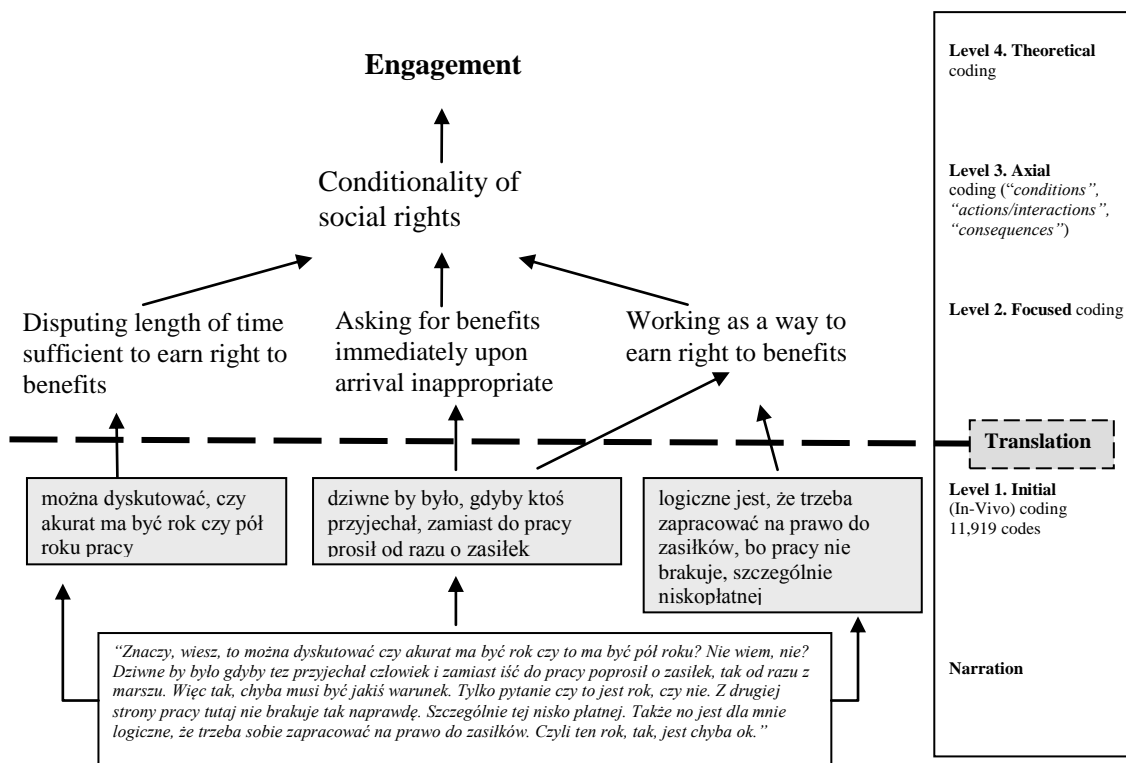
Coding and translation

Although a multi-stage coding process is a constitutive element of the GT method, scholars cannot agree on a definite number of stages in this process (LaRossa 2005). However there is a general agreement that coding progresses from codes referring to substantive, specific issues to codes of higher level of abstraction, until a core concept is selected and relevant themes that emerged during the research integrated around it in one 'story'.

I followed coding guidelines outlined by Charmaz (2006), who advocates four coding stages: initial (in-vivo), focused, axial, and theoretical coding. Charmaz stresses the importance of a meticulous, initial coding stage, whereby text is examined if possible line-by-line and coded with a maximum preservation of language used by a narrator and often using their own expressions as 'in-vivo' codes. The author suggests to "code data as actions", mainly by using gerunds and verbs, which convey a "strong sense of action

and sequence” (Charmaz 2006: 48-49). Due to the importance of the preservation of original meaning at the initial stage of coding, I decided to do it in Polish. A line-by-line analysis of the 50 interviews resulted in 11,919 initial codes, closely corresponding to what was being said in the narrative and constituting building blocks for the analysis (see Figure 2).

Figure 2. Interview coding and translation scheme



Source: own elaboration based on Charmaz (2006).

During the focused coding stage the researcher creates codes which are “more directed, selective, and conceptual” (Charmaz 2006: 57). It requires selecting the most insightful initial codes and using them for further categorisation of data. For instance, the code ‘disputing length of time sufficient to earn right to benefits’ embraces a number of initial codes pertaining to views on the temporal conditionality of migrants’ social rights (see Figure 2). Unlike initial codes, the focused codes are prone to a great deal of revision, merging and rewording during analysis.⁶³ As focused coding indicates a step change in analytical work with the data, I decided to switch at this point from Polish to English.

⁶³ This is why I cannot provide the exact number of focused codes, which were formed and transformed during drafting and re-drafting of empirical chapter. I grouped all initial codes thematically into about 125 so called ‘code families’ in Atlas.ti. However these code families do not constitute the focused codes, but simply allow for a quick retrieval of relevant chunks of interview data.

The third stage of coding – the ‘axial coding’ – “specifies the properties and dimensions of a category” (Charmaz 2006: 60). According to Charmaz, “the purposes of axial coding are to sort, synthesise, and organize large amounts of data and reassemble them in new ways”. Strauss and Corbin (1998 [1990]: 125) stress that during axial coding a researcher answers “questions about the phenomenon such as when, where, why, who, how, and with what consequences, thus giving the concept greater explanatory power”. For instance, the issue of conditionality of social entitlements was reiterated by participants, both in relations to the conditions that they claimed to be fulfilling, that they argued should be fulfilled by other migrants, and in relation to the general principle of conditionality of social rights that applies both to newcomers and locals. Thus participants indicated how conditionality should be and how it is understood by them. As a result the category of conditionality of social rights – viewed as both necessary and contentious – becomes conceptually multidimensional.

Finally, during the last stage of ‘theoretical coding’, previously developed conceptual categories are assembled together to see how they relate to each other (Charmaz 2006). It is the stage at which “data become theory”, which is arguably the most challenging part of data analysis “as the findings should be presented as a set of interrelated concepts, not just a listing of themes” (Strauss and Corbin 1998 [1990]: 144-145). Although the idea is to offer a coherent analytic proposition grounded in data, Strauss and Corbin (1998 [1990]): 145) warn that “there is *not* just *one* correct way of stating relationships.” This integration is usually done by selecting one core category or variable, which focuses researcher’s writing and serves “as the backbone of a researcher’s ‘story’” (LaRossa 2005: 838). In this case such a central variable for theoretical explication of migrant agency is the category of engagement – the terms, forms, and attempts of engagement with the host society as thought through and enacted by migrants, which ultimately pertains to an explication of grassroots citizenship. For instance, the category of conditionality of social rights describes the terms of engagement with social citizenship. Other important categories linking up with engagement are recognitions by others, encounters with others, identifications, or needs. Two major caveats accompanied this coding process. Firstly, there was the issue of fine tuning the successive codes at the right level of abstraction. As LaRossa (2005) notes, if codes are too substantive, they are too unique to describe other similar occurrences. If on the other hand they are too abstract, they are too all encompassing and do not add analytical insights. Secondly, anxiety over the right level of abstraction was exacerbated

by the fact that this was a cross language research conducted in Polish but analysed in English. I strived to preserve the meaning of Polish narratives throughout the coding process. Being a native Polish speaker I was able to translate collected material without the help of third parties, but the caveats remained. Such translation is an important but often neglected issue in social research (Temple 2002; Temple 2006; Temple and Young 2004). For instance, it raises the question of representation of participants. Temple (2006: 14) found it ironic, reflecting on her own research among migrants requiring interpreters to access public services, that “the research was with people who struggled to express what they needed in English and yet we had to produce written accounts showing them as fluent English speakers”.

The GT analysis has to be nuanced, attentive to language and meaning (Charmaz 2006). But the task seems more complex when one needs to both adequately reconstruct the subjective meanings and translate them into another language for analytic purposes. As Temple (2006: 14) explains a researcher-translator is caught in a “difficult and often unrecognised balancing act between denying the importance of the language used and implying that language is tied to meaning in a deterministic way”. The fact that there is no “one-to-one relationship between language and meaning” presents both a problem and an opportunity for cross language research (Temple and Young 2004: 174). It is a problem as it requires a laborious process of translation, but also an opportunity showing that cross language qualitative analysis is in many respects similar to analysis within one linguistic universe, where meanings can be equally elusive (Temple and Young 2004: 174). Either way one needs to factor in translation as “a part of the process of knowledge production” (Temple and Young 2004: 164).

Reflexivity and its limits

It is fair to repeat after Charmaz (2005: 510) that “no analysis is neutral”. We do not pick research topics without theoretical or ideological preconceptions or inclinations, social reality is not available to our cognition in its pure, ‘true’ form, we modify the reality by researching it, we are not impartial observers, and we do not communicate the results of our endeavours from a ‘neutral’ position.⁶⁴ Thus it remains necessary to reflect on the researcher’s own positionality within the research process and to question

⁶⁴ This also applies to quantitative methods in social sciences. In the process of any statistical analysis a researcher makes a host of more or less arbitrary assumptions. Above all there is “the ontological difference between unquantifiable reality and its operationalization into measurable variables” (Uhlmann 2004: 81).

“taken-for-granted actions in our research” (Charmaz 2005: 525). Thus reflexivity can be regarded as the fourth crucial principle of grounded theory alongside theoretical sampling, constant comparison, and emergence.

As there were no financial incentives to take part in this research and no other tangible benefits, the motivation of 62 busy Londoners, who agreed to take part and devoted a considerable amount of their free time, requires some explanation. I chose to introduce myself to potential participants as a ‘sociology student’ (*studentka socjologii*) and arguably this is how most persons perceived me. I argue that the main motivation to take part was to do with the participants’ desire to help me to successfully complete my studies⁶⁵. Respondents with experience of higher education appreciated the difficulty of conducting fieldwork and writing a thesis. Some shared the same aspirations of continuing their studies and saw the interview encounter as an opportunity to discuss the UK higher education system and my own experiences of it. Whilst some older participants exhibited what can be described as a nurturing attitude towards me as ‘a student’. They perceived my potential success as a part of the collective success of Poles in Great Britain.⁶⁶ Alongside the desire to help me, some participants were glad to get an opportunity to talk to another person about their concerns and frustrations. Lesbian and gay participants appreciated the inclusion of homosexual couples as one of the family types in the research design tackling mainstream issues. They also appreciated an interest in their views as citizens rather than focusing solely on their sexual identity. A few participants were hoping that insights from this research may become useful in future by highlighting certain problems that migrants face.⁶⁷ After the interview some participants sought advice on specific issues that they faced.

The position of a researcher as a ‘cultural insider’ also calls for some reflection. Being a native Polish speaker and a migrant to the UK did not make me an ‘unproblematic’ cultural insider to all the participants. As Ganga and Scott (2006: 1, 8) argue, shared

⁶⁵ The following selection of statements illustrates this motivation: “*if only this could be helpful and make the situation a bit clearer for you, you can use everything what I’ve said*” (Wanda); “*I am glad to have been useful for the evaluation of Polish community residing in London and to serve the science :)*” (Tomek); “*for this diploma, for this thesis*” (Andrzej); “*Of course I agree, if you need such help and if my information will be useful to you in some way*” (Wiktor); “*If I did not want to share this, I would have said that I have no time. But I heard..., I wanted to help somehow, so you gather different opinions*” (Bartek).

⁶⁶ This was expressed most clearly by Maria: “*I simply want to help you in some way, well, God... I am glad that a Pole will do a doctorate here, or is going to do it in London, and very well*”.

⁶⁷ However others were sceptical about any public benefit of this research dismissing it as just “*talking shop [gadanie]*” (Sylwia). Such a view was expressed as a part of a general disillusionment with politics and activism.

ethnicity paradoxically “increases awareness amongst both researcher and participant of the social divisions that structure the interaction between them”, a phenomenon which the authors termed “diversity in proximity”. In the case of this fieldwork there were educational, generational, gender and socioeconomic division lines and the fact that I was not born in Poland.⁶⁸ Yet Richards and Emslie (2000: 75) argue that it is not so much who you are, but “who respondents *think* you are affects what you get told.” Perception of myself as being ‘from Poland’ resulted in participants’ wariness of disclosing too many details about their situation in Poland. In contrast, they seemed to be at ease talking at length about their situation in England, ways of engagement with London welfare institutions, and functioning in migrant niche economy. Thus my relationship with the participants is best described as a continuous negotiation of “insider/outsider dynamic”, with attempts to build on commonalities shared with a particular participant, but at the same time “without being false”, by being honest about the differences that set us apart (Ganga and Scott 2006: 24, 36).

The debates as to which procedures – those employed during the research process or performed post hoc – are best placed to evaluate the validity and reliability of qualitative research are well known (Morse, et al. 2002).⁶⁹ Charmaz (2005; 2006) proposes various indicators against which to judge the quality of GT research spread over four dimensions – credibility, originality, resonance, and usefulness. One of the resonance criteria is whether “the analytic interpretations make sense to members and offer them deeper insights about their lives and worlds?” (Charmaz 2005: 528). I decided to put the findings to such a test by re-contacting the participants and asking them to provide feedback on the preliminary results.

Between March and June 2009 I made an attempt to re-contact all 62 participants. A short report summarising the main conclusions drawn from the in-depth interviews was disseminated among participants (see Appendix 7). Apart from the feedback, I wanted to gather some basic information on the whereabouts and life situation of the participants. In order to gather such information I designed an on-line questionnaire and asked the participants to complete it (see Appendix 8).⁷⁰ Although all interviewees agreed to be re-contacted and on the whole appreciated the opportunity to see the

⁶⁸ However not all respondents were aware of the latter unless they asked specific questions about my background.

⁶⁹ In essence reliability refers to whether one would arrive at the same results, had the research been repeated; whilst validity refers to whether the research addressed the issue which it set out to study.

⁷⁰ The questionnaire was hosted on the UCL Opinio platform: <https://opinio.ucl.ac.uk/admin/index.jsp>. Participants who did not use internet were contacted by telephone or met in person.

findings, only 37 participants out of 62 completed the follow-up questionnaire (see Appendix 9, Table 26), and out of those only ten people actually provided any feedback on the results. This is perhaps not surprising given the additional time required to read, think through and comment on the results and limited resources available to track down participants and extract the feedback.

Notwithstanding this the comments provided show that the findings resonated with the participants in some way (see Appendix 10). To be sure, consulting the summary of results with participants is not a verification strategy. This is because “study results have been synthesised, decontextualised, and abstracted from (and across) individual participants, so there is no reason for individuals to be able to recognize themselves or their particular experiences” (Morse, et al. 2002: 7). For instance Ryszard who relied on the support of the day centre for homeless migrants criticised the findings for being too general and removed from specific problems that people like him face. However Bogdan who also used the day centre remarked “*you can only describe it all, this is your role, I do not see any bias in this (report).*” Corden and Sainsbury (2006) note that participants may not agree with how the researcher chose to represent them by selecting, editing and translating their spoken words, however this does not invalidate the research as such.

To summarise, scholars increasingly recognise that the full reflexivity – the examination of the position of a researcher, the researched and the research context and how this affected the knowledge produced – may be impossible to achieve (Ganga and Scott 2006; Rose 1997). As Rose (1997: 311) argues full reflexivity is “an illusion”, as questions that need to be answered to map fully the context of power, to know oneself and the other are beyond the capability of any one person. As Rose (1997: 316) notes “there is no clear landscape of social positions to be charted by an all-seeing analyst; neither is there a conscious agent, whether researcher or researched, simply waiting to be reflected in a research project. Instead, researcher, researched and research make each other.” Being Polish, a migrant, a student, a woman, in my 30s and other characteristics impacted my interactions with participants in a complex and unique mix of unrepeatable circumstances of each interview encounter. Thus there are no quick fixes for the worries of an adequate representation of research participants, power imbalances or wider implications of one’s research. The advice is to “keep these worries, and work with them” (Rose 1997: 318).

Thus the full, reflexive examination of the qualitative research project is ultimately limited by the same factors, which limit generalisations of human agency. Sociologists believe that every activity has some objective aspect or repeating pattern which can be captured by reconstructing the actor's system of values and attitudes and the landscape of obstacles that the actor faces. Nevertheless our understanding of human agency remains at best a well grounded approximation, which tames and orders uncertainty, but cannot do away with it completely.

Ethical considerations

As research constitutes an unprovoked, purposeful intervention into somebody else's social world, it raises a range of ethical issues.⁷¹ Research into migrants' attitudes towards welfare redistribution can be considered a sensitive topic in more than one way. Firstly, it touches upon the often difficult personal circumstances of individuals. Interviewing about such issues invites introspection of participant's personality and goals, and delves deep into emotional subjects. Such "uncalled for self-knowledge" may cause some psychological distress (Sin 2005: 279).⁷² Secondly, it exposes the less powerful actor's ways of engagement with a more powerful actor – in this case the host state's welfare bureaucracy. Research which exposes the ways of working with and against 'the system' may jeopardise the effectiveness of such practices. The latter dilemma is particularly well known to migration researchers, especially those studying undocumented migration, who worry that their research may expose new patterns of irregular migration or clandestine behaviour previously unknown to the authorities (Düvell, et al. 2008; Jordan and Düvell 2002: 9). This issue is perhaps somewhat less salient in the case of research of intra-European migrants, who enjoy powerful supranational mechanisms of protection in the form of various European Union institutions, legislation and courts. Nevertheless during this fieldwork some gatekeepers were concerned that research into welfare take-up may affect negatively the collective image of Polish migrants in Britain, given already negative coverage in some sections of the British press.

One can argue that a thorough process of obtaining informed consent is there to mitigate the ethical concern of potential psychological discomfort. This research followed a

⁷¹ A full discussion of ethical implications of this research has been included in the form submitted to the UCL research ethics committee prior to the fieldwork.

⁷² A number of interviewees found interviews introspective. However one can argue that due to voluntary nature of participation this was largely perceived as an opportunity to "*open up [wygadać się]*" (Michał) rather than an emotionally taxing experience.

somewhat unorthodox approach to obtaining consent, by abandoning the signed consent form and opting instead for a verbal consent recorded at the beginning of each interview.⁷³ Yet a lot of effort was put into informing participants about the study by outlining their rights (of voluntary participation, of voluntary disclosure of information, and of withdrawal), the obligations of the researcher (of ensuring confidentiality and anonymity of data and retaining independence) and informing about the subject and purpose of research (by explaining the areas of substantive interest and the nature of the doctoral project). Thus obtaining informed consent was not a one-off event, but a process of obtaining and maintaining consent throughout various stages of the research, to account for the “fluidity of consent” (Sin 2005: 277). This process was initialised by public introduction of the research, distribution of the leaflet, and answering any questions about the research. Participants who provisionally agreed to take part were reminded about their rights and had opportunity to ask questions at the stage of recruitment, when arranging time and place for an in-depth interview and once again before the beginning of each interview.

After the interview all participants gave their consent to be re-contacted once again in 2009. Between the interview and the follow-up phase contact with the participants was maintained by sending cards, emails or texts for Christmas and Easter holidays. Thus participants effectively had numerous occasions to let the researcher know that they do not want to participate any longer in this study and want to stop the relationship with the researcher.

One can argue, that such a process of maintaining consent minimised the withdrawals and the likelihood of any adverse events during the fieldwork. It also created an atmosphere of mutual respect and amicability between the researcher and any (potential) participants. There were only two cases when an individual decided to withdraw after giving initial consent. In the first instance, the person changed their mind just before an interview was due to commence. In the second case, the person withdrew upon re-contact citing the questions of a follow-up questionnaire as “*too personal*”. All in all, by targeting a diverse milieu of Polish migrants and stressing the voluntary nature of participation in this research, a diverse sample of volunteers was compiled, all of

⁷³ Arguably collecting verbal consent deformed the interview situation. The written formal consent form, identifying a respondent by name and signature, was inappropriate because it might have been confused with other ‘official’ forms. It could undermine the claims of independence of the researcher and jeopardise the rapport. Secondly, some people may still be wary of signing forms, the purpose of which is not entirely clear to them.

whom were willing to share their opinions and did not perceive the questions as too intrusive.

3.5 Summary

Recognising the caveats of studying human agency, this research attempted to utilise the research methods best suited to excavating the subjective meanings and causal unfolding of social actions, in other words to achieving an “explanatory understanding” (Weber 1978: 8). It is nested within the pragmatist epistemology oriented towards finding plausible explanations in the course of systematic inquiry attentive to human experience. As Hickman (2004) notes pragmatist researchers are focused on tracing the practical consequences of beliefs and notions and seeing what difference they make in the reality. Although pragmatists adhere to a “moderate version of cultural relativism”, unlike postmodernists, they project a sense of optimism about the possibility of arriving at tentative answers to posed research questions (Hickman 2004: 65). Pragmatists reject a priori theoretical or ideological dogmatism focusing instead on the level of human experiences looking for “a human commonality that is not fixed and finished but emergent” (Hickman 2004: 68).

This research also shares what Delanty (2005) describes as a critical realists’ understanding of the causality in social sciences. As Delanty (2005: 147) writes “critical realists (...) investigate the mechanisms by which effects operate, the powers and properties that they produce and the intricate inter-linkages between the different levels of structures which all make causation very complex and thus, irreducible to single factors.” This is why many structural conditions have to be outlined in order to contextualise the views and experiences of participants as far as engagement with British social citizenship is concerned. One important factor is mapping the institutional landscape within which this engagement takes place. The focus of the next chapter is thus on the UK and EU social and immigration policies impacting the lives of Polish migrants.

Chapter 4. Polish migrants as British social citizens. An interplay of policies and legacies

This chapter delineates the limitations and opportunities for agency as erected by a set of EU and UK policies, which affect the everyday lives of Polish migrants in the UK. It has been argued that migrants from EU countries which joined the EU in 2004 found themselves in a “bureaucratic maze” of complex rules and regulations governing their social entitlements in the UK (Currie 2006: 216). Faist (2001: 37) noted that such complexity is due to European citizenship being “nested” in multiple, “regional, state and supra-state” levels of governance (Faist 2001: 37), which produce complex combinations of rights. This is why it is important to trace social rights of EU citizens-migrants as they are defined and modified at each and every level of nested membership – from the EU institutions, through the UK welfare state, to UK local communities in charge of delivering the public services and being the ultimate sites of substantiation of social rights.

This chapter offers a review of key areas of legislation outlining the scope of formal social rights of Polish migrants in the UK: EU law regarding the free movement of persons, intra-European coordination of social security and the transposition of freedom of movement provisions into UK domestic law. Furthermore as far as the localised delivery of social rights is concerned the premises of the UK welfare system in areas of non-contributory welfare benefits, social housing and healthcare are briefly reviewed. In addition, the value legacy of Poland’s welfare system is examined and its potential role in affecting participants’ preferences. The chapter concludes with a review of official statistics on the take-up of British social entitlements by Polish migrants.

4.1 Social rights of EU citizens-migrants in EU legislation

EU citizenship and freedom of movement

One can note that Polish migrants enjoy the bulk of their social rights in Britain by virtue of being European citizens. At present European citizenship remains a hybrid case of supranational citizenship. Its hybridity stems from the fact that access to European citizenship is controlled entirely by the national authorities of member states of the EU, whilst its content in terms of rights associated with it – by the supranational European executive, legislature and judiciary. For instance, Bauböck (1997: 10)

describes EU citizenship as “a thin roof resting on the separate and differently-shaped columns of national citizenships”. Furthermore European citizenship is devoid of an identification dimension and common public sphere, and so it remains a top-down, bureaucratic creation (Delgado-Moreira 1997; Schierup, et al. 2006). However, this is not to say that European citizenship is meaningless or lacks saliency. On the contrary, one can argue that for ordinary people residing in the EU, both negative and positive consequences of European citizenship became apparent especially after the 2004 enlargement of the EU, which brought about a big wave of intra-European mobility. EU citizenship is not only a hybrid, but also a “highly stratified status”, as it does not give rise to uniform entitlements to all citizens who possess it (Dwyer 2004: 162). For example, it is largely meaningless for citizens residing in their home states as in order to feel any benefits of EU citizenship one has to move to another member state (Bauböck 1997).⁷⁴ Mobile EU citizens are further stratified according to the level of their economic activity in the host country in that workers and self-employed EU migrants-citizens enjoy greater social rights in the host EU country than economically inactive EU migrants-citizens (students, retired, self-sufficient etc.). The rights’ differentiation within the notion of EU citizenship between economically active and inactive citizens has been vividly described as that between “citizens-as-workers” and “citizens-as-human-beings” (Castles and Davidson 2000: 99). A leaflet outlining rights to social security for mobile Europeans puts it bluntly: “persons who are neither employed nor self-employed, are not drawing pensions as former workers, and are not covered by a general insurance scheme for workers – so-called nonactive persons – are as such not yet covered by the Community provisions on social security” (EC 2005: 40). The privileged treatment of economically active migrants originates from the founding principles of the EU. Freedom of movement of persons, goods, services and capital constitute four fundamental freedoms on which the EU was founded. Scholars point out that the original rationale of EU citizenship was the promotion and facilitation of workers’ mobility in the internal market and ensuring that workers are not worse off when moving than when staying in their home countries (Ackers 1998).

The gap between the market-driven principles of European citizenship and the reality of diverse migration flows, which include large sections of economically inactive

⁷⁴ For instance Lansbergen (2009a; 2009b) argues that EU citizenship is essentially discriminatory towards EU citizens living in their home countries as they have less advantageous family re-unification rights comparing with EU citizens living in another EU member state.

populations, has been analysed in a number of in-depth studies of intra-European mobility (Ackers 1998; Ackers 2004; Ackers and Dwyer 2002; Ackers and Stalford 2004; O'Reilly 2007). For instance, as EU citizenship scores low on the decommodification scale it tends to disadvantage women, whose relation with the paid labour market is disrupted due to childbearing or caring responsibilities. Thus rather than being treated as citizens in their own right, for example through the recognition of an economic value of care and household work women's claims to social rights stemming from EU citizenship are validated against their own or their partners' paid employment (Ackers 1998; Ackers 2004). This results in women's "very high levels of personal dependency on working spouses" (Ackers 1998: 316).

Furthermore, the EU citizenship set-up affects older people. EU citizenship does not recognise an increasingly common situation, when retired persons, again mainly women, undertake migration within the EU in order to provide rather than receive care. So it does not take into account the changing care patterns within families due to the increased longevity whereby the retired population is split into the 'young old', which often provide care for the 'old old' and for their grandchildren's generation. Thus as Ackers (2004: 383) observes EU legislation in this area has been built "on the stereotypical model of family and dependency relationships". Moreover researchers observe that provisions for free movement largely exclude older European citizens both directly because of their economically inactive status and indirectly due to the "predominantly national healthcare and pension systems" (Dwyer and Papadimitriou 2006: 1304).

Finally, EU citizenship, as with any other form of citizenship, performs a crucial boundary drawing and sorting function. Morris (2002: 146) argues that within the EU "the clearest formal markers of inclusion and exclusion with respect to key rights" are statuses of national citizens, EU citizens and non-EU citizens residing in the EU countries. The latter enjoy far fewer rights than the two former categories. To sum up, EU citizenship represents an exclusive and transnational symbiosis of somewhat opposing principles of market and polity.

The Citizens' Directive

Access to social security of the host country by EU citizens exercising freedom of movement rights is guided by specific (and immensely complex) provisions for various

categories of EU citizens scattered in various EC regulations and directives.⁷⁵ Directive 2004/38/EC, known as the ‘Citizens’ Directive’, represents an attempt to consolidate the EU stance with regards to rights of EU citizens exercising freedom of movement. It differentiates the conditions attached to the right of residence on the territory of the host member state depending on the length of such residence and the category of an EU citizen. According to the directive, EU citizens have an unconditional right to enter and reside in a host member state for a period of up to 3 months. During this initial period there is no obligation on the part of the host state to provide EU migrants with social assistance, unless they are economically active (art. 24 (2), Directive 2004/38/EC).

The right of residence for a period longer than 3 months remains unconditional for persons who are workers or self-employed. These categories are guaranteed “the same social and tax advantages as national workers” (art. 7(2), Regulation EEC 1612/68) and equal treatment on a par with home citizens.⁷⁶ In contrast, economically inactive categories of EU citizens must fulfil the condition of being self-sufficient, possessing comprehensive sickness insurance and not becoming “an unreasonable burden on the social assistance system of the host Member State” (par. 10, preamble to Directive 2004/38/EC).⁷⁷

The Citizens’ Directive also envisages a right of permanent residence, which an EU citizen acquires if she has resided in a member state for a continuous period of 5 years in accordance with any conditions attached to her residence and “without becoming subject to an expulsion measure” (par. 17, preamble to Directive 2004/38/EC).⁷⁸

Persons who acquire the right of permanent residence in another EU state are no longer subject to any conditions attached to their residence such as working, being self-sufficient or having comprehensive medical insurance and gain additional protection against expulsion, unless on serious grounds of public policy or public security. An

⁷⁵ See Appendix 11 for a summary of relevant legislation and case law. Another legal route is provided by the general principle of non-discrimination on the grounds of nationality contained in the Article 12 of the EC Treaty (Rogers and Scannell 2005). However this route is rarely effective in practice. For instance, a Polish citizen was unsuccessful in her claim for UK Income Support on the basis of non-discrimination principle (*Kaczmarek vs. Secretary of State for Work and Pensions*).

⁷⁶ Such a right to reside also includes some categories of former workers and self-employed persons, mainly those who have ceased work involuntarily, for example as a result of accident at work.

⁷⁷ Family members’ rights of residence are derived from the rights of a person who primarily draws on the community legislation. Thus if the right to reside of a primary person is subject to certain conditions so does the right of residence of their family members (Rogers and Scannell 2005). Family members in the EU law encompass a (legal) spouse, dependent descendants, and dependent relatives in ascending line. Unmarried cohabiting partners are treated on a par with legally married spouses only in those member states where national legislation recognises such unions.

⁷⁸ Some categories of former workers can acquire right of permanent residence earlier. See Appendix 12 for a summary of relevant vesting periods.

unconditional right of permanent residence is set out to be “a genuine vehicle for integration into the society of the host Member State” and a sign of strengthening “the feeling of Union citizenship” (par. 17&18, preamble to Directive 2004/38/EC).

Thus the social rights of EU citizens-migrants in the host member state are the most ambiguous between 3 months and 5 years of their residence period. During this time the disproportionate reliance on social assistance of the host country by economically inactive EU citizens may be seen as a breach of condition of self-sufficiency and endanger or even forfeit one’s right to reside, which in turn may serve as a basis for person’s expulsion from that country. However at the same time economically inactive persons are safeguarded from being deported simply as a result of their recourse to the social security system of the host country (art. 14(3), Directive 2004/38/EC). The Directive requires member states to examine all individual circumstances on a case by case basis and urges the application of the principle of proportionality in any cases subject to removal by stating that “the greater the degree of integration of Union citizens and their family members in the host Member State, the greater the degree of protection against expulsion should be” (par. 24, preamble to Directive 2004/38/EC).

The role of the European Court of Justice

The institution in charge of defending the rights and interests of EU citizens engaged in intra-European mobility is the European Court of Justice.⁷⁹ It has been observed that in the field of social protection the ECJ is engaged in a “delicate balancing act” between protecting the social rights of EU citizens, removing barriers to free movement within the EU and appeasing the interests of member states interested in safeguarding their welfare states (Lenaerts and Heremans 2006: 114).

A number of ECJ decisions established the right to claim social assistance by economically inactive EU citizens in particular circumstances (Fitzpatrick et al. 2007a: 362).⁸⁰ In line with the Citizens’ Directive, the ECJ rulings reinforced the requirement for a member state to apply the principle of proportionality when dealing with economically inactive EU migrants and to show a degree of solidarity with an EU citizen, especially in cases where the claimant’s problems are temporary and where dependent children are involved. Thus although the unqualified right of residence for all

⁷⁹ ECJ is the primary institution involved in interpreting EU law, giving rulings when requested by the courts of the member states and establishing legal precedents, which feed back into EU law.

⁸⁰ For example in such cases as *ECJ Grzelczyk C-184/99*, *ECJ Bidar C-209/03*, *ECJ Baumbast C-413/99*, and *ECJ Trojani C-456/02*.

EU citizens does not exist, a person “who initially expected or was able to support themselves (...) should not automatically lose their right to reside” (Fitzpatrick et al. 2007a: 365).

Ackers (1998) concludes that some of the ECJ decisions signal a shift of EU citizenship to a more inclusive and holistic model. Yet such a process is not unidirectional, as ECJ rulings do not filter through automatically to relevant individuals, but instead their application “depends on the national courts’ interpretation and goodwill”, which is sometimes lacking (Currie 2009: 56-57). For instance Rogers and Scannell (2005: 381) note that some UK courts’ decisions give “the impression that national law standards have been applied at the expense of the dilution of Community law principles.” Similarly, Morris (2002: 157) acknowledges the crucial role of both supranational and domestic courts in interpreting ambiguous cases, yet points out that there is great “scope for national difference in the honouring of international obligations”. So the ECJ decisions have to filter through the national authorities before having a real effect on the lives of ordinary Europeans.

Portability of welfare rights within EU

In order to remove any disincentives to labour force mobility within the common market one had to address the issue of the portability of workers’ entitlements such as pensions (Fitzpatrick, et al. 2007a; Martinsen 2007). As a result, existing EU provisions mainly regulate the portability of contributory benefits and apply to persons with an established employment relationship in the host country.⁸¹ Only the benefits falling into a ‘social security’ category, such as those designed to insure against the predefined risks of sickness, maternity, invalidity, old age, bereavement, accidents at work, occupational diseases, death, unemployment and family benefits are covered by the coordination provisions (Fitzpatrick, et al. 2007a: 299).⁸²

⁸¹ The social security coordination principles are laid out in the EC Regulation 1408/71 in conjunction with EC Regulation 574/72 and in a host of subsequent amendments to those regulations, in particular Regulation EC 883/2004 (see Appendix 11).

⁸² As of 2007 in the UK fully exportable benefits were Incapacity Benefit, retirement pension, bereavement benefits, and industrial injuries benefits (Fitzpatrick et al. 2007b: 1397). Furthermore a number of benefits had “limited exportability”. These were such benefits as Child Benefit, Child Tax Credit, Guardian’s Allowance, contribution-based JSA, Statutory Sick Pay, Maternity Allowance and some others. They can be exported within the EU under certain conditions and for a short period of time. For example, Child Tax Credit and Child Benefit can be claimed for family members, who reside in another member state. Similarly contribution-based Jobseeker’s Allowance can be paid by a member state, where a person last worked for a period of up to three months of residence in another member state. Apart from the EU law provisions some domestic UK regulations allow for certain UK benefits to be claimed in certain specified circumstances during temporary absences abroad. For example, Housing

Fitzpatrick and colleagues (2007a: 302-309) explain that the coordination of portable social security benefits within the EU is achieved by the application of several principles. Firstly, the principle of ‘lex loci laboris’ states that at any one point in time a person is subject to only one state’s legislation, usually the legislation of the state in which he or she works. Secondly, the non-discrimination principle prohibits both direct and indirect discrimination on the grounds of nationality. The aggregation and apportionment principles allow periods of insurance, employment or residence in other member states to be added, when calculating certain benefits and ensure that each state pays out on a pro rata basis, depending on the amount of contributions made in that state. The exportability principle ensures that certain benefits “cannot be reduced, modified, suspended, withdrawn or confiscated” as a result of a beneficiary moving to a different member state (Fitzpatrick et al. 2007a: 307). And finally there is a rule against overlapping benefits, which ensures that a person cannot claim two benefits of the same kind from two different member states.

In contrast, the ‘social assistance’ type benefits, which are granted on a discretionary basis “by the state to its citizens or long-term residents who are unable to provide for themselves, and are without alternative financial means” remain explicitly outside the scope of coordination rules (Martinsen 2007: 4)⁸³. The special status of social assistance has been confirmed by the ECJ, which held that “the basic principle of Community law is that persons who depend on social assistance will be taken care of in their own Member State” (par. 70, Opinion of Advocate General Geelhoed in *ECJ Trojani C-456/02*)⁸⁴. Thus it seems that whilst efforts are made towards coordination of contributory benefits, benefits which are classified as social assistance are left out of coordination provisions and remain in the sole domain of a member state.

Similar to social security systems, the healthcare systems of EU member states remain diverse and nationally bounded.⁸⁵ At present, the only uniform EU-wide scheme in operation is the European Health Insurance Card. It is available to people who are covered by public insurance schemes in their home or residence countries and covers

Benefit and Council Tax Benefit can be claimed for up to 52 weeks mainly in circumstances when one is providing or receiving care abroad (Fitzpatrick et al. 2007b: 194).

⁸³ The third category of benefits, the so called ‘special non-contributory benefits’ with features of both social assistance and social security, such as UK disability benefits, are regarded as non-exportable. Yet the latter is often a subject of the disputes (Fitzpatrick et al. 2007a: 299; Martinsen 2007).

⁸⁴ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:62002C0456:EN:HTML>

⁸⁵ This is also true with regard to social housing schemes, yet their portability is not an issue as housing is not a portable asset by definition.

the costs of accessing emergency care during temporary visits to other EU member states. In contrast going abroad with the main purpose of receiving treatment requires prior authorisation from the home country health authorities (Lenaerts and Heremans 2006: 109). Yet as a result of a number of ECJ rulings, such authorisation is not required for out-of hospital treatments. Furthermore if the wait for hospital treatment in the home country is unacceptably long, national health authorities are obliged to give permission to go abroad for treatment (EC 2006). In both instances patients should be reimbursed up to the level of reimbursement provided in their own system.

Notwithstanding these general principles, the European Commission admitted that there is a lack of legal certainty in patients' rights to cross-border healthcare (EC 2006: 3).⁸⁶ It initiated an attempt to reach an agreement between member states on a coherent healthcare coordination framework, which would clarify the rules on information, reimbursement, complaints and other procedures (EC 2008a; EC 2008b). It is not clear how many proposals will materialise in EU law. Furthermore, there is a possibility that the internal market in healthcare within the EU based on partial reimbursement of costs may actually undermine the principles of tax funded, universal healthcare systems such as the NHS (Lenaerts and Heremans 2006: 109). Thus the transnational exercise of social rights to healthcare is likely to remain a contentious issue, which member states will be keen to continue to control.

Whither Social Europe?

The existence of a supranational court protecting the rights of EU citizens and the portability of some social entitlements within Europe implies some kind of European social citizenship. However one can argue that the vision of a social Europe remains within the intrinsically unequal confines of a marketised EU citizenship, as individuals engaged in economic activity enjoy a greater scope of social rights and are able to take advantage of their portability.

Furthermore there is an ongoing bargaining process between the EU institutions and national authorities trying to preserve the closure of their welfare states. For instance in response to the ECJ decisions widening the scope of EU social citizenship "member states have taken counter measures to strengthen national residence clauses" (Martinsen

⁸⁶ Another complication is presented by the fact that as a result of ECJ rulings, healthcare is considered "an economic service" (Lenaerts and Heremans 2006: 109). This requires striking the balance between "free movement dynamics" and "potential strain imposed upon the national healthcare systems by the creation of a 'socio-medical area without frontiers'" (Lenaerts and Heremans 2006: 110).

2007: 3). Thus member states backed by their domestic judicial systems resist supranational pressure and guard the sovereignty and exclusivity of their welfare systems. They show no will to pass on these prerogatives to the supranational authorities, beyond the minimum negotiated in the coordination and free movement agreements. In particular, Martinsen (2007: 22) observes that the right to reside test introduced by the UK goes against “the parallel development of Union citizenship”. Larkin (2009: 44) notes that UK regulations applicable to citizens from EU8 states “run against the thrust of any idea of any form of common European social citizenship”.

Thus the social rights defined at the European level remain mainly the prerogative of the mobile labour force and have to be first upheld by the national authorities before filtering down to ordinary citizens-workers. This is because in everyday life ordinary Europeans deal with the relevant national authorities which decide their substantial rights. As Lenaerts and Heremans (2006: 101) stress EU citizens-migrants acquire national social rights on the basis of EU law and not supranational European social rights. Thus at the most the supranational European level of governance performs a disciplining function by setting out common standards and procedures and thus gradually steering national redistribution mechanisms in certain direction (Ferrera 2005: 219).

Some scholars claim that in practice social citizenship in the EU remains nationally bound and presumes a stable population which progresses from the phase of contribution to the phase of claims through the life course (O'Reilly 2007). It seems that welfare states even more so than nation-states are intolerant of dual loyalties. This is not to say that migrants do not attempt to stretch the notion of dual social citizenship to its limits. The diversity of social policy arrangements within the EU creates the scope for such agency. Yet there are winners and losers in this quest, as many face structural disadvantages because of various gaps in service provision and other “welfare illogicalities” in various member states (Warnes 2002: 149). For instance, some British migrants encouraged to seek ‘a Place in the Sun’ in Spain lose out as they “no longer have the right to use the national health service in the UK, have severely reduced their entitlements to UK pensions and social service benefits, yet are not addressing this through private or Spanish provision” (O'Reilly 2007: 284).

Overall, the diversity of social protection systems within the EU creates loopholes and disequilibria which are exposed by intra-European migrants. Yet in practice the scope of social rights of EU citizens-migrants depends on the domestic legislation of the host

member states. The latter however is likely to be affected by the interests of national authorities who seek to safeguard their welfare states and restrict the access of outsiders.

4.2 Social rights of EU citizens-migrants in the UK legislation

Who has the right to reside?

In the process of transposition into UK domestic legislation EU policy may undergo a number of significant modifications. Member states have a range of derogation and opt-out mechanisms that can affect the terms of such transpositions either by delaying them or opting out of them altogether. Furthermore, even when the transposition of EU law takes place, it may be selective, inaccurate or contradictory (Larkin 2009; Rogers and Scannell 2005). For example, legal practitioners note that the transposition of the Citizens' Directive does not fully reflect the provisions of EU law, especially when it comes to deciding whether an EU citizen has the right to reside in the UK or not (CPAG 2007; Fitzpatrick 2006).⁸⁷

EU legislation envisages the right to reside in a host member state for both economically active and inactive EU citizens. Yet in 2004, to coincide with EU enlargement, the UK narrowed down the right to reside which qualifies for accessing British social entitlements only to EU citizens who are economically active in the UK. The latter category comprises workers, self-employed, certain categories of jobseekers and some categories of former workers (Cousins 2007: 73; Fitzpatrick et al. 2007a: 139).⁸⁸ At the same time the UK authorities accept that each claim to UK social benefits classified as 'public funds' by an economically inactive EU citizen-migrant has to be assessed on an individual basis.⁸⁹ This is in order to establish whether a particular claimant presents "an unreasonable burden on the state" (HO 2009c).

⁸⁷ The Immigration (European Economic Area) Regulations 2006 (SI no. 1003) contain the transposition of the Citizens' Directive. The implications for administering welfare benefits and social housing are set out in the Social Security (Habitual Residence) Amendment Regulations 2004 (SI no. 1232), Social Security (Persons from Abroad) Amendment Regulations 2006 (SI no. 1026) and the Allocation of Housing and Homelessness (Amendment) (England) Regulations 2004 (SI no. 1235) (see Appendix 11).

⁸⁸ This was achieved mainly through toughening the criteria applied in various residence tests, which applicants must satisfy before becoming entitled. In particular, in order to pass the habitual residence test applicants have to prove that they have a right to reside in the UK (par. 2, Social Security (Habitual Residence) Amendment Regulations 2004).

⁸⁹ As of 2007 the list of 'public funds' included Income Support, income-based Jobseeker's Allowance, Housing Benefit, Council Tax Benefit, Child Benefit, Child Tax Credit, Working Tax Credit, Pension Credit, Social Fund Payments (e.g. funeral expenses or maternity Sure Start grant), four types of disability allowances: Attendance Allowance, Carer's Allowance, Disability Living Allowance, Severe Disablement Allowance and housing provided by local authorities – either under homelessness legislation

This cocktail of UK and EU legal provisions resulted in a Kafkaesque situation whereby some EU citizens can stay in the UK lawfully and potentially indefinitely, but have an ‘insufficient’ or ‘substandard’ right to reside for claiming UK social entitlements.

Furthermore the mere attempt to access British ‘public funds’ may endanger their right to reside in the UK.⁹⁰ Thus some EU citizens may find themselves in limbo as they may stay in the UK as long as they wish and are not subject to deportation but at the same time they may not have a right to reside in the UK.

This position was endorsed in a number of Social Security Commissioners’ decisions refusing the claims of EU citizens to UK Income Support or Pension Credit (see Figure 3). Some of the applicants were women who had resided in the UK for several years, had a history of work or study in the UK but had stopped working due to childcare responsibilities. Due to the double meaning of ‘right to reside’ some of the arguments used to reject these applications appear particularly confusing, if not contradictory, to a layperson.

Figure 3. Selected excerpts from UK Social Security Commissioners’ decisions regarding eligibility of EU citizens to UK non-contributory benefits

- CIS/4286/2007, Dutch citizen refused Income Support, Commissioner Mark Rowland:
“It is clear that a national of an EEA state may be lawfully present in the UK without having a right of residence.” (par. 7)
 - CIS/0865/2008 Latvian citizen refused Income Support, Commissioner Edward Jacobs:
“the claimant had a residence permit. However, that permit does not confer a right to reside. It is merely evidence of a right (...). The evidence in this case does not, as I have said, show that the claimant had a right to reside in EC law and there is no evidence that she has been given a right to reside under domestic immigration law.” (par. 16)
 - CPC/3588/2006 French citizen refused Pension Credit, Commissioner Edward Jacobs:
“A permit was merely recognition of a right, not a condition for that right. (...) The only right that arises under EC law is the right to have the documents issued, not the right to reside. Whether the claimant has a right to reside is a matter for domestic law and no argument has been put that the claimant has a right to reside under the domestic law.” (par. 30)
 - CIS/2358/2006 Polish citizen refused Income Support, Commissioner Mark Rowland:
“If a person does have a right of residence, discrimination is unlawful under Article 12. On the other hand, unequal treatment is permissible if it is a consequence of a person not having a right of residence.” (par.10)
- Source: www.osspsc.gov.uk , www.rightsnet.org.uk ©Crown Copyright

Thus establishing whether a person has the right to reside in the light of EU and UK law is often extremely complex. It has been observed that there is potentially some

or through the waiting lists (Fitzpatrick et al. 2007a: 86). The majority of such entitlements are means-tested.

⁹⁰ However the sanctions for breaching the self-sufficiency requirement are limited to withholding a person’s registration certificate, which is an optional document merely confirming (retrospectively) that a person has a right to reside in the UK in the capacity of EU citizen, but not granting such right (HO 2009c).

considerable scope for confusion (Cousins 2007) and for a “high error rate in decision making” (Fitzpatrick et al. 2007a: 139). Furthermore it has been suggested that the right to reside test applied by UK authorities lacks legal transparency and may be incompatible with EU law (Cousins 2007; Fitzpatrick 2006; Lakhani 2005).

The Worker Registration Scheme

Citizens of EU8 countries which joined the EU in 2004 face additional hurdles. Currie (2006: 211) argues that the transitional measures introduced at the time of enlargement by the UK government produced “arguably the most exploitative post-accession free movement regime.” This is because as the author concludes “the UK system gives with one hand, by opening up the labour market, but takes away with the other by restricting welfare entitlement” (Currie 2006: 228 see also Fitzpatrick, et al. 2007a; Rogers and Scannell 2005).

The UK transitional measures were outlined in the Accession (Immigration and Worker Registration) Regulations 2004, which established the Worker Registration Scheme (WRS). According to the WRS non-exempt workers from EU8 countries must register their work and accrue 12 months of uninterrupted employment in the UK.⁹¹ In addition, they are required to re-register each time they change their employer within the period of 12 months. Only after fulfilling these requirements does the person gain the status of an EU worker. After completing 12 months of continuous, registered employment a person may apply for a registration certificate, an optional document confirming a particular person’s “right of residence under European law as at the date of issue” but “not required (...) to enter, live or work (or exercise any other treaty right) in the United Kingdom” (HO 2009d: 3). Self-employed and economically inactive EU citizens may also apply for this document. However one can argue that this provision is highly confusing as a registration certificate merely confirms a retrospective right on the basis of being a worker, self-employed, a student, self-sufficient or a family member rather than granting any prospective rights, in that sense it is relatively useless to people whose life circumstances subsequently change, for instance if they lose their jobs.

The requirement to register with the WRS impacts eligibility for social entitlements that fall into the ‘public funds’ category. Workers who register their work are eligible to claim benefits such as Child Benefit or Working Tax Credit straight away. However if a

⁹¹ Self-employed migrants, those who already worked legally at the time of accession and economically inactive migrants from EU8 countries were exempt. They were treated as EU citizens, subject to relevant EU provisions, from the date of accession (Fitzpatrick et al. 2007a: 359).

worker who has not yet accrued their 12 months period loses their job or stops working for any other reason and cannot secure another job within 30 days they also lose their entitlement to benefits, for example they cannot claim Jobseeker's Allowance (MAC 2009). Furthermore they have to start accruing their 12 month period of continuous work anew (Fitzpatrick et al. 2007a). Thus registration with the WRS remains a condition for the acquisition of the right to reside in the capacity of a worker by non-exempt categories of workers from the EU8 countries.

There is some research evidence to suggest that the premises and implications of the WRS scheme were not properly appreciated by some migrants. Research showed that migrants from EU8 countries were reluctant to pay the registration fee of £90, a substantial sum of money for people in low paid jobs.⁹² As a result a substantial proportion of those subject to the registration requirement have not done so (Anderson, et al. 2006; Ruhs and Anderson 2006).

Participants of this study also had the tendency to perceive compulsory WRS registration (for non exempt individuals) as an optional condition. In contrast the 'optional' registration certificate, issued upon completion of 12 months period of work, was seen as "*a good paper*" (Bartek), which tended to smooth over the contacts with many official institutions. Thus the WRS presents another piece in a jigsaw of complex rules on the eligibility of Polish migrants to UK social entitlements.

Arguably, some migrants were unaware of the long-term negative implications of the failure to comply with the WRS requirements (Broadway 2007). Yet the UK courts were meticulous in endorsing all the requirements of the WRS, including an obligation to re-register every employment in the initial 12 months period (see Figure 4).

Figure 4. Case of *Zalewska v Department for Social Development*, no. [2007] NICA 17.

A Polish citizen came to Northern Ireland in July 2004. From July 2004 to January 2005 she worked as a mushroom picker. She registered this job in the WRS scheme. After her contract expired she immediately found another job, however failed to re-register the change of the employer with the WRS. Judge maintained that "*the applicant only worked as a registered worker for a 6 month period and thereafter took unregistered employment. She, therefore, failed to fulfil the condition to be satisfied if she was to be treated as lawfully admitted to the labour market during the relevant period*" (par. 24). Subsequently she was joined by her child and partner. After experiencing domestic violence, she moved into women's hostel and applied for Income Support. At the time of the application for IS she was not working. She was refused IS on the grounds of having no right to reside in the UK. The Court of Appeal in Northern Ireland upheld this decision of the Social Security Commissioner.

Source: www.courtsni.gov.uk , © Crown Copyright

⁹² At the time of introduction the WRS registration fee was £50, it increased to £70 in October 2005 and once again to £90 in April 2007 (SI 2007 no. 928).

One can note that the most vulnerable category of migrant workers – recent newcomers with limited knowledge of English engaged in seasonal, casual, low paid work – find it hardest to pay the registration fee and to comply with all conditions of the WRS. Whilst benefiting from migrant labour the UK does not provide them with any safety nets, should they fall into difficulties (Currie 2009). Larkin (2009: 43) argues that such set-up means that “there will inevitably be hardship among A10 migrants”. Thus the existing rules effectively leave some EU citizens-migrants outside the scope of the institutionalised host welfare state. If their informal support networks are scarce or unreliable, such persons face the prospect of homelessness and destitution and become dependent on the charity sector (Homeless Link 2006; McNaughton 2008; Rzeźnik 2007).

Apart from shaky moral grounds, there are legal doubts about the compatibility of the WRS with EU law. This is chiefly because the Accession Treaty provides the scope only for transitional measures that aim to restrict access to the host labour market (Cousins 2007; Fitzpatrick et al. 2007a).⁹³ The WRS scheme is often presented to the general public as “strict working restrictions for Eastern Europeans” (HO 2009a). Yet arguably the aim of the WRS is to restrict access to the UK welfare system rather than to the labour market, which since May 2004 remains *de facto* fully open to EU8 citizens (Fitzpatrick et al. 2007: 358; Rogers and Scannell 2005). Perhaps the ambiguity and confusion surrounding the WRS has some strategic benefits to the authorities, as ultimately the lack of registration with the WRS significantly curtails the social rights of EU migrants.

Providers’ interpretation of the social entitlements of EU8 citizens-migrants

In light of such legal complexity it is not surprising that the Audit Commission (2007: 10) found “widespread confusion about entitlements” among stakeholders and front line staff dealing with newcomers from EU8 countries and noted the need for better information and guidance. Deciding as to which benefits an EU8 citizen is entitled in a particular life situation is a complex matter as apart from establishing whether a person has a right to reside in the UK for the purposes of claiming benefits it requires weighing up a multitude of other factors such as applicant’s age, past and present economic activity, income, history of previous claims and migrations and all the circumstances of

⁹³ Such measures could be in place for 5 years from the date of accession or in case of “serious disturbance to the labour market” for up to 7 years (Rogers and Scannell 2005: 90). The UK government decided to keep the WRS scheme beyond the initial 5 year period (HO 2009a).

their family members. Even competent “welfare benefitologists” have problems with hacking through this legal jungle (Sayo 2008).⁹⁴ For instance, there is a documented pattern of directing women, who have accrued a year of registered work but subsequently temporarily ceased their economic activity due to childcare responsibilities, to Income Support, to which they are not entitled (CPAG 2007; Williams 2009). Furthermore the fact that different authorities are responsible for administering different benefits creates scope for inconsistent treatment not only between different individuals, but also with regards to the same person claiming different types of benefits (Fitzpatrick, et al. 2007a).⁹⁵ Fitzpatrick argues that there is a deficit of case law accurately representing the rights of EU citizens in the UK and encourages challenging any decisions refusing benefits by the UK authorities to persons who appear to have the right to such assistance under EU law (CPAG 2007; Fitzpatrick 2006).

Local authority housing in England is considered part of ‘public funds’ so all of the above issues apply to the applications for social housing from EU8 citizens. However Perry (2005: 23) notes that “housing associations are not bound by the same restrictions as local authorities, and should in principle treat new migrants as any other applicants”. Thus it should be ‘easier’ to get into social housing offered by social landlords other than the local authorities. However in practice many housing associations operate common housing registers with the local authorities, so their freedom to decide on applicants is curtailed.⁹⁶ Also it is not clear to what extent migrants are aware that they can apply directly to housing associations.

Unlike welfare benefits and local authority housing, healthcare provided by the NHS is not considered part of the ‘public funds’. Faithful to its founding principles it remains a free service to all people who are ordinarily resident in the UK. A person is deemed ordinarily resident if he or she “is living lawfully in the United Kingdom voluntarily and for settled purposes as part of the regular order of their life for the time being, with an identifiable purpose for their residence here which has a sufficient degree of continuity to be properly described as settled” (DoH 2004: 22). In the current set-up EU citizens should have no problem in demonstrating that they have a right to reside

⁹⁴ Ambiguous cases are regularly discussed on the benefits advisers’ forum: www.rightsnet.org.uk.

⁹⁵ Local authorities, HM Revenue and Customs and Department for Work and Pensions can come to different conclusions as to particular person’s right to reside in the UK. The Home Office is the relevant institution which has a final say on whether a particular person has or has not a right to reside in the UK.

⁹⁶ The CORE data show that housing associations and local authorities have a similar (and small) propensity to allocate housing to foreign citizens (see Chapter 4.5).

lawfully in the UK in the capacity of EU citizens “exercising one of five EU treaty rights – employment; self-employment; job-seeker; student; self sufficient” (DoH 2007b: 41-42).⁹⁷ The ordinary residence test has no reference to a person’s economic activity status or national insurance contributions (DoH 2004: 22), thus the economically inactive EU citizens should be able to fulfil this residence test.⁹⁸ However a clarification memo issued by the Department of Health in 2007 suggests that there was some initial confusion among NHS staff as to the entitlements of EU8 citizens. The memo states that “contrary to previous advice, persons from the A8 Member States may be deemed to be ordinarily resident here (and therefore not caught by the charging Regulations at all)” (DoH 2007a: 2). Thus some migrants may have been wrongly denied registration with a GP or charged for hospital services.⁹⁹

4.3 British welfare benefits, social housing and healthcare systems: national premises, local delivery

The initial confusion of front line staff as to the entitlements of EU migrants shows that ultimately the substantiation of migrants’ social rights depends on the correct interpretation of the law by the service providers. In this thesis I decided to focus on three crucial areas of public services namely welfare benefits, social housing and the healthcare system. These areas represent the welfare state’s response to the fundamental human needs of income subsistence, shelter, and medical care. In that sense these areas of welfare are the core enabling rights which are meant to ensure the basic physical survival of citizenry. Furthermore alongside the education system and social care, they represent the cornerstones of historical development of the British welfare state (Lowe 2005). In that sense they are traditionally seen to embody its principles and premises.

⁹⁷ However hospitals in England are obliged to identify patients who are not ordinarily resident in the UK and apply charges for services they use (DoH 2007b). So patients who are admitted to hospitals or attend out-patients appointment for the first time can expect to be asked whether they have lived in the UK for the past 12 months and whether they can prove that they have the right to live in the UK.

⁹⁸ There is little information on how to interpret the requirement contained in the Directive EC/38/2004 for economically inactive EU citizens-migrants to possess “comprehensive sickness insurance” (Fitzpatrick, et al. 2007a; Rogers and Scannell 2005). Such a requirement makes more sense in member states operating insurance-based healthcare systems but little in the context of universal, tax-funded NHS (Dwyer 2001; Mossialos and Thomson 2002). For example, according to the NHS rules all foreign students on qualifying courses which last over 6 months are exempt from charges (DoH 2007b). In contrast, according to EU law, students are required to possess medical insurance. It seems that the UK public healthcare system remains more inclusive than the EU provisions allow for.

⁹⁹ Namely workers may have been required to show that they have registered with the WRS “otherwise they are not *lawfully* working here” (DoH 2007a: 2).

The inception of the modern British welfare state can be traced back to William Beveridge's 1942 report "Social Insurance and Allied Services". The report envisaged a central role for the state in the provision of healthcare, employment, education, housing, and social security and these premises were implemented after WWII (Alcock 2008: 5; Blakemore and Griggs 2007: 49). In the post-war decades a uniquely British blend of social democratic and liberal thinking embodied in writings of such social policy theorists as Marshall, Beveridge or Titmuss resulted in a distinctive model of a universal, unconditional welfare system rooted in the understanding of social citizenship as an ascribed citizen's right (Plant 2003). However in the 1980s this model was superseded by a sharp neoliberal turn towards the more selective, conditional and targeted welfare programmes (Schierup, et al. 2006).

Welfare benefits

Before the 1980s unemployment benefits were considered an unconditional social right, as it was primarily the government's duty to maintain full employment (Lowe 2005: 114-119). Following the era of Thatcherism, successive Conservative and Labour governments have shifted the 'blame' for unemployment onto individuals, at the same time making work "the basic badge of citizenship" (Plant 2003: 163). The way to achieve this was through a set of 'workfare' policies focused on getting unemployed jobseekers and "non-working claimants receiving other benefits" back to work by using a mix of incentives and sanctions (Bryson 2003: 79). For instance, New Labour pursued a policy of downgrading universal, non-contributory benefits (by withdrawing them or decreasing their value) and offering instead a range of selective, means-tested benefits targeted at particular groups (young people, disabled people, single mothers), which were often more generous, but at the same time were conditioned upon remaining in or actively seeking work or training and changing lifestyle patterns (Blakemore and Griggs 2007: 81). Due to its American provenance the shift to workfare policies has been termed the "'neo-American' trajectory" (Schierup, et al. 2006: 111). During the economic boom of the late 1990s and 2000s, at the time of labour shortages, the welfare-to-work programmes were an attempt to (re)engage large sections of economically inactive British population with the paid labour market.

Moreover the emphasis on work as the core organising principle of the welfare system extended benefits to a large number of working people on low income. The latter was primarily achieved through tax credits, non-contributory top-up benefits administered

by tax authorities, which supplemented low wages and were more generous than out-of-work benefits (Plant 2003). One can argue that due to their non-contributory character tax credits represent a kind of social assistance to workers in low wage economy, whose wages on their own would be insufficient to cover the real costs of living. On the other hand they are a subsidy to employers, enabling them to keep the costs of labour low at the expense of the taxpayer.

There is some evidence that tax credits type schemes genuinely improve the situation of many individuals and families on low income (Davies 2007; Habibov and Fan 2008), however they also come with many pitfalls. As Bryson (2003) notes, tax credits present a disincentive to higher earnings in the medium term as people are focused on retaining the supplement as their wages increase. Secondly, tax credits serve as “a disincentive to two-earner status among couples” in that the non-recipient partner (usually woman) has no incentive to return to the labour market, as this carries a financial penalty in the form of supplement decrease or withdrawal (Bryson 2003: 93). Moreover, Plant (2003) envisages that a side effect of building a system of welfare around paid employment puts a government in an awkward position of having to provide both job places and welfare at the time of rising unemployment. This is what seems to have happened following the global financial crisis which began in 2007. The UK government maintained its commitment to welfare-to-work programmes (Barker 2009a; Barker 2009b) and came up with the proposal of government backed ‘job guarantee’ schemes for the long-term unemployed (Barker 2009c; Barker 2009d).

Furthermore, the period of recession following the financial crisis affected the situation of migrant labour which had been encouraged during the boom time “in order to make up for deficiencies in UK education and training” (Schierup, et al. 2006: 136). The inflow of newcomers to the UK labour market from EU8 countries may have decreased as measured by the number of new applications for the WRS, which displayed a downward trend since the fourth quarter of 2007 (HO 2009b). However there was no massive outflow from the UK as people faced uncertain prospects everywhere. For instance, the stock of EU8 citizens residing in the UK continued to rise between 2007 and 2008, albeit at a slower pace, and reached 705,000 people in 2008 (Salt 2008: 41). As a result both native and immigrant residents began to compete over fewer available jobs, which led to tensions, culminating in an increase of protectionist demands and a host of industrial actions against wage dumping, practiced by EU subcontractors in Britain (Guthrie 2008; Pignal and Barber 2009).

Social housing

The modern British welfare state also had an ambition to address the need for shelter and eliminate homelessness and poor housing conditions. As privately rented housing is profit driven, the public provision of rented housing was seen as a solution to the housing problem (Alcock 2008). The period after the end of WWII saw a big rise in local authority owned and socially rented housing in the UK. Yet since the 1980s local authorities are increasingly withdrawing from the role of housing providers (Alcock 2008; Blakemore and Griggs 2007). This was a combined effect of the introduction of the ‘right to buy’ of local authority accommodation at discounted rates, the stopping of central government subsidies to local authorities for building new public housing schemes, and transfers of whole housing schemes from the local authority to management by private landlords or housing associations (Alcock 2008: 87). As a result of these policies the share of local authority housing in Britain dropped from around 30% in 1970s to about 15% in 2000s (Alcock 2008: 73). These changes did not result in the total disappearance of local authority housing but instead in its extensive residualisation. As Blakemore and Griggs (2007: 210) note “council housing is now only rarely the type of home occupied by skilled, higher paid working-class people”. The outflow of the better-off social tenants to owner occupation strengthened the perception of social housing as a “second-class provision for those who could not afford to buy” (Alcock 2008: 87).

Arguably it is owner occupation that was, and remains, the core value of Britain’s housing policy and a widespread social aspiration (Alcock 2008: 82; Blakemore and Griggs 2007: 213). The 20th century witnessed a remarkable rise in owner occupation in Britain from 10% in 1914 to 69% in 2001 (Alcock 2008: 73). Various schemes such as shared ownership are designed to help people on low incomes to become home owners. Social housing is thus further residualised in the light of an overwhelming majority of owner occupiers.

Despite the focus on home ownership in government policy, a significant minority continues to live in socially rented accommodation and the demand for social housing remains considerable, especially in areas such as London. For instance in 2008 there were over 353,000 households (or 11% of total households) on the waiting lists for local authority accommodation in London and over 1,770,000 in the whole of England (or 8% of total households) (C&LG 2009a). Currently, local authorities, often in partnership with housing associations, operate points-based or banding housing

allocation systems (Rutter and Latorre 2009). Although local authorities have some flexibility to prioritise certain groups, this has to be done within the scope of legislation imposed by central government, which establishes a statutory obligation for local authorities to provide housing for certain individuals and families who have a 'greater housing need', for instance certain categories of homeless people such as families with children.

Housing Benefit can be seen as an alternative to renting accommodation from social landlords. This is a means-tested subsidy administered by local authorities covering the difference between what a tenant can afford to pay and a market rent. The size of the subsidy varies according to individual claimant's circumstances, but it is usually quite generous. Alcock noted that such a set-up tended "to fuel further increases in market rents" at considerable costs to public expenditure (Alcock 2008: 77). In 2008 the calculation of Housing Benefit has been changed by capping it at the median rent level in the local rental market (DirectGov 2009), which is meant to stop rents from spiralling up.

Healthcare

Healthcare is in many respects a unique public service within the UK welfare system. This is because, unlike in other welfare areas, its core premises of unconditional, universal, needs-based, tax-funded, 'free' at the point of use public service have remained largely unchanged since the establishment of the National Health Service in 1948. The underlying principles of universality and equality of access make the NHS a very popular, albeit much criticised, institution, "a defining characteristic of the British way of life" (Blakemore and Griggs 2007: 189).

In contrast to the founding principles, the NHS is prone to frequent changes at the organisational level (Alcock 2008). It is a highly complex institution consisting of fragmented, geographically differentiated, semi-autonomous organisations grouped into subsystems of primary, secondary and tertiary care. Medical professionals – general and specialist doctors – enjoy a high degree of autonomy and power within the NHS structure. For instance, as a result of the legacy of autonomy enjoyed by family doctors prior to the establishment of the NHS, GPs act as gatekeepers to most services provided by the NHS, including hospital care. They are paid not as salaried employees of the NHS but as independent contractors (Blakemore and Griggs 2007).

Furthermore, since the reforms of the Conservative government in the 1990s, an ‘internal market’ has been introduced to the NHS in England. In an attempt to drive up efficiency and standards, healthcare organisations were divided into purchasers and providers of healthcare. As at 2008, England was divided into 152 Primary Care Trusts, which control the largest chunk of the NHS budget and take on the role of chief purchaser of medical services in a particular area (Alcock 2008: 62). In addition, bodies such as the National Institute for Clinical Excellence and the Healthcare Commission have been set up to provide ongoing regulation and monitoring of the performance of healthcare services.

Despite the popularity of the principles on which access to the NHS rests, there are growing public concerns about the quality of service provision. Notwithstanding the move to patient-led healthcare endorsed by New Labour, which was meant to give patients a greater say and choice in the way healthcare is delivered, concerns remain about long waiting lists for treatments, hospital cleanliness, limits on expensive treatments such as cancer or life-prolonging drugs, geographical disparities in the scope and quality of services on offer, and lack of accountability and transparency in healthcare practice and management structures (Blakemore and Griggs 2007). Thus arguably, although the NHS is still cherished by the British public, it is also increasingly subject to strong criticism as a result of growing public expectations towards healthcare services.

Overall, Esping-Andersen (1990) classified the UK as an example of a liberal, residual welfare regime with a low decommodification effect of citizenship. Although starting off with the premise of universal welfare as a matter of equality of status such a welfare regime develops into dualism as the better-off turn to private insurance and the market to satisfy their growing welfare needs and expectations, whilst the worse-off are forced to rely on meagre, residual state welfare. This leads to the loss of legitimacy of, and support for, the public welfare system from the middle and upper classes as they lose their stakes in it (Esping-Andersen 1990: 25). One can argue that in Britain only the NHS has managed to resist the trend towards the residualisation of public provision as despite many criticisms there is a cross-class consensus on the need to maintain the NHS precisely because private medical insurance is inadequate and incomprehensive especially in the case of chronic, long-term illness involving expensive treatments (Alcock 2008: 68).

Localism and devolution

The set-up of the British welfare system cannot be properly understood without examining the process of devolution of power to the nations constituting the UK and the role of local government in delivering public services.

Although there were always differences in political and administrative structures between the four nations – England, Scotland, Wales and Northern Ireland – constituting the UK, since 1999 the process of devolution of real power in policy making, including social policy, gained pace (Alcock 2008: 238). It resulted in a significant divergence in policy direction between the four nations, in particular in areas of healthcare and social housing, with Scotland characterised by a relatively lesser degree of marketisation and privatisation of public services in general. Whilst much of law making in the area of social policy is devolved to the Scottish Parliament, the National Assembly for Wales, and the Northern Ireland Assembly, England continues to rely on the (UK) Westminster Parliament.

Many scholars note that the historical roots of the modern welfare state in Britain are in local initiatives to deliver services (Alcock 2008; Warnes 2002). Also Marshall (1950: 21) saw the origin of English social rights in “membership of local communities and functional associations”. Only after the end of WWII, following the expansion of state welfare policies, did local governments gradually lose their social policy making powers and influence. However Warnes (2002) argues that the heritage of localism is still discernible today in the residency tests that guard access to much of the social assistance and public services in the UK.

Currently, local government structures in England are mainly focused on policy delivery, whilst policy making takes place at the national level. Although the administration of many welfare benefits remains prerogative of local authorities, it is the central government that sets out the rules, according to which such administration should proceed (Aspinall and Mitton 2007: 383). The exceptions are education, social housing, and personal care services, where local governments retain some policy development powers, yet even in these areas central government maintains the upper hand by controlling the bulk of the local budgets for these services (Alcock 2008: 245). Thus Alcock (2008: 237) argues that despite established local government structures and the process of devolution, the UK remains a relatively centralized, unitary state.

London, where the fieldwork for this study has been carried out, remains a significant centre of local power, with an elected Mayor's position and a range of powers in policy making such as those relating to transport and policing, however not with regard to social policy or immigration. It is divided into 32 local authorities (London Boroughs) and the City of London Corporation, which carry prime responsibility for administration and provision of welfare services to their residents. The service delivery principles within local authorities have shifted to embrace a mix of private and non-governmental providers and local authorities repositioning their role from service providers to service "enablers" – working in partnerships with a host of public, private and voluntary organisations to ensure "that appropriate services are delivered to meet the needs of local citizens" (Alcock 2008: 254). Due to the role of local authorities as chief administrators of welfare, inevitably there are disparities and variations in service quality and availability.

Interestingly, as local authorities were losing their policy making powers, the local identifications of persons residing in England have been growing steadily since 2003 as measured by the Citizenship Survey. In 2008 76% of respondents declared the feeling of belonging to their neighbourhood compared with 70% in 2003. Significantly there were no differences between people classified as 'white' and 'minority ethnic groups' (C&LG 2009b: 34-35). Thus one can hypothesise that ethnic minorities and immigrants have the same propensity to identify with local areas as hosts. One can argue that local areas remain central to the welfare system not only because the actual redistribution takes place within local communities, but also because they are the potential foci of social solidarity and identification necessary to legitimise the redistribution. In order to exercise their social rights, citizens have to come into contact with predominantly local officials and providers. Also the tensions and conflicts over redistribution of public goods tend to flare up and have to be resolved in the local communities (Dench et al. 2006). Thus the local level of governance remains crucial for substantiating formal social rights.

4.4 The impact of Polish welfare legacies, discourses and policies

The interplay of EU and UK policies and the UK localised welfare delivery mechanisms impact the formal and substantial social rights of Polish migrants residing in London. The question remains to what extent the home country context influences their position as social citizens in Britain. The potential impact can be traced to several areas: the

legacy of the Polish welfare state shaping social attitudes and expectations, current portability of Polish entitlements, specific Polish government activities targeting Polish migrants, and Polish diaspora welfare provision.

The Polish welfare system, at the time of its institutionalisation during the inter-war period, adopted many German solutions, which were in place on the territory of the former Prussian partition, such as compulsory and comprehensive social insurance schemes and local authorities' responsibility for providing welfare for its inhabitants (Zalewski 2005). This tradition was severed during the post-war period, when social policy was subordinated to the aims of political doctrine. The main features of the socialist welfare state were the centralisation of welfare provision, the policy of full employment and prices control, extension of social insurance to all employed population and their families, and employing organisations as main welfare providers.¹⁰⁰ Thus in this period, one's belonging to the occupational community was more important in determining the scope of available welfare than belonging to a particular local community.

One should note that the discourse of social citizenship, well established in British social theory and social policy, is largely absent from Polish academic debates. Such an absence can be explained by a different historical path of development of the welfare system in Poland. As Kochanowicz (1997) observes, in the communist period the bureaucratic, prescriptive project of social welfare was imposed on Polish society regardless of existing social tensions and not in order to appease them, as in the case of piecemeal, consensual welfare state development in Western Europe. Hence welfare provision in Poland has never become associated with struggles for citizens' rights, as in the notion of social citizenship.

Despite these differences one can also note many similarities between welfare socialism and welfare capitalism. Narojek's (1991: 50) analysis of social relationships in the "socialist welfare state" showed that despite the official rhetoric of collectivism "pragmatic small individualism" was the dominant social attitude in everyday life of communist Poland. It meant that an individual was focused on "the maximum usage of opportunities for manoeuvre, brought about by the regime built on collectivist principles, in order to achieve private aims" (Narojek 1991: 50). In that sense, people

¹⁰⁰ Although Golinowska (2002) notes that in Poland other welfare providers – religious, cooperative and private organisations – were allowed to a greater extent than in other socialist countries. Furthermore Polish farmers were not covered by many state welfare programmes.

used a variety of means of “small collectivism”, requiring the cooperation of ‘other people’ such as informal connections, bribes, persuasion, exchange of favours, but their aspirations and aims remained essentially individualistic and oriented towards improving private consumption and aiming for positions with greater access to resources (Narojek 1991: 59).¹⁰¹

Furthermore Zalewski (2005: 187) notes that the emphasis on “work as a re-socialisation factor” in the socialist welfare state bears some resemblance to the capitalist workfare programmes. Moreover both systems may have created a similar culture of dependency. In response to arbitrary and nonnegotiable distribution criteria enforced by the Polish authorities, some people tended to develop a syndrome of “learned helplessness” (*wyuczona bezradność*) (Marody 1987: 93; see also Kochanowicz 1997; Narojek 1991). A perceived lack of connection between one’s actions and social reality led to passivity and expectations that all personal problems ought to be solved by the state (Narojek 1991: 46). Thus as one social commentator observed, Polish citizens treated state authorities with suspicion but also with considerable paternalistic expectations: “Polish state (...) always was and remains a hostile, alien structure, which one ought to cheat, but at the same time this does not at all impede demanding from it various benefits and forms of welfare” (Ziemkiewicz 2009).¹⁰²

After 1989, the reforms of the social security system in Poland were gradual and incomplete rather than radical (Kochanowicz 1997; see also Deacon 2000). The welfare system had to take on the cushioning role, protecting from risks of unemployment and inflation and adjusting the range of services to new client groups. Nowadays the Polish system of social security is characterised by the return to the pre-war importance of local government structures and by use of means-testing (Zalewski 2005). Furthermore, it is characterised by a low level of individualisation of welfare, as benefits are usually paid to the family unit as a whole rather than to individuals. The benefit levels are set relatively low, so it provides only limited help to poor and unemployed people (Golinowska, et al. 2003: 37).

¹⁰¹ Narojek sees this situation as a form of societal schizophrenia and argues that the conformist “small individualism” undermined the centrally planned socialist regime from within and in a much more efficient way than any of the open revolts and social movements (Narojek 1991: 51, 58).

¹⁰² Some sociologists argue that the relationship between individuals and political structures in Poland lacked the grounding in the notion of common good, which led to the emergence of various adaptive strategies as resourcefulness, corruption, nepotism, materialism, and individualism (Gliński 2004; Śpiewak 2005).

In 1999 healthcare reform changed the system of financing healthcare, which brought about some negative consequences for low income groups (Watson 2006). Healthcare is provided on the basis of compulsory health insurance with almost universal coverage of residents of Poland divided into several dozen statutorily insured social groups. In particular, the Labour Fund (*Fundusz Pracy*) pays the health insurance premium on behalf of the registered unemployed. Thus some persons may register as unemployed primarily to secure access to free healthcare rather than with real intention of finding work (Fandrejewska 2009).¹⁰³ Although there is the possibility of taking out voluntary health insurance for groups which are not covered, social policy analysts note that it is very rare in practice, thus “absence of a statutory obligation to be insured is tantamount to the absence of cover in the event of a sickness” (Golinowska, et al. 2003: 112). Provision of social housing and housing allowances since the mid-1990s remains the responsibility of local authorities.

After 1989 and in the absence of a social citizenship discourse, the issues of citizens’ rights and duties, and civic engagement are usually raised within the academic discourse of civil society (*społeczeństwo obywatelskie*) (Gawkowska, et al. 2005; Krauz-Mozer and Borowiec 2006; Kwiatkowski 2003).¹⁰⁴ The central institutions in this discourse are NGOs, family, church and local community. It commonly features a call for an active, ‘do-it-yourself’ citizen, engaged in voluntary, social work for the common good of their community. Arguably, the idea of “social microactivism” summarises the essence of Polish civil society discourse, with its focus on exploring generalised trust, mechanisms of social cooperation, self-help and voluntarism (Nowak 2008: 155). Yet Marody (2004: 403, 408) is critical of this quest for “the ghost of civil society” in Polish sociology, seeing it as “a desperate call for the social integration idea in the context of the growing disintegration of contemporary societies”. Furthermore one can argue that such a discourse is fairly removed from the popular construct of a ‘good citizen’ endorsed by the Polish public whereby social activism received relatively low ranking compared with other factors (see Chapter 2.3).

The decision to move abroad inevitably impacts the status of Polish persons as Polish social citizens. The scale of this impact depends on the social group that one belongs to.

¹⁰³ There are proposals to introduce sanctions in that the unemployed who refuse a job or training offer may lose their access to free healthcare (Rakowska-Boroń 2008).

¹⁰⁴ Of course the notions of social citizenship and civil society are closely related (Somers 2008). For instance social rights’ guarantees could not have been achieved and cannot be sustained without vibrant institutions of civil society.

For instance, working age adults usually lose their entitlement to Polish healthcare as a result of not being employed in Poland, whereas retired persons usually retain it. Likewise Polish pension entitlements are not affected by a move to another EU country upon retirement (ZUS 2008: 45). The move abroad can also complicate one's entitlement to municipal social housing (*mieszkanie komunalne*), however the rules in this regard remain unclear and can lead to disputes (Czajkowska 2008). Also the payment of certain benefits, such as invalidity pensions for victims of deportations and war veterans, may be stopped as a result of a move abroad, however this practice was successfully challenged in the ECJ (Wiktorowska 2009).¹⁰⁵

Apart from the various rules on portability of Polish social entitlements, one can argue that there are no major home state social policies specifically targeting Polish emigrants. Prior to the change in law in January 2007, the double taxation regime requiring Polish citizens to pay Polish tax on income earned in the UK not only discouraged the return to Poland, but effectively promoted severing any ties with Poland (e.g. selling properties, moving family abroad, closing Polish bank accounts) in order to convince the Polish tax authorities that one is not a resident in Poland for tax purposes.¹⁰⁶

In 2008 an official government website was launched by Prime Minister Donald Tusk during a visit to London which serves as a one-stop shop advice centre on all practical matters and formalities connected with re-settling in Poland.¹⁰⁷ Apart from containing general advice, it is an interactive service where individuals can post their queries and are promised answers by public officials. The website was presented not as a part of a campaign to encourage returns or promote Poland, but rather an attempt to “create the system, which would facilitate the solution of concrete, often very individual problems of Poles returning to the country” (CIS 2008).

Arguably instead of focusing on policies targeting Polish migrants abroad, the Polish debates oscillated around the impact of emigration on Polish local communities. In particular, the new term ‘euro-orphans’ (*eurosieroty*) was coined to describe cases of children's emotional, psychological or physical neglect as a result of labour emigration of one or both parents (Fundacja Prawo Europejskie 2008). Also the alleged ‘care drain’

¹⁰⁵ See case of *Nerkowska C-499/06* (Wiktorowska 2009).

¹⁰⁶ In January 2007 new rules came into force, which state that in any given tax year people who received income only from the UK do not have to pay taxes in Poland and those who had income from both countries will have to pay Polish tax only on a share of income earned in Poland, yet according to the tax rates calculated on the basis of income from both countries (Kopacz 2006).

¹⁰⁷ www.powroty.gov.pl

affecting older people left without family's support received some attention (Kolarska-Bobińska 2008). Local welfare administering institutions noted an increase in workload due to the rising number of families with a family member working abroad switching from Polish family benefits to the more generous family benefits from various EU countries (Kobińska 2006).

The efforts of an established Polish diaspora in the UK in providing 'ethnic safety nets' to new arrivals were also limited. The Federation of Poles in Great Britain printed an information guide about life and work in the UK addressed to newcomers (ZPWB 2008). Also a number of sporadic events usually initiated by the Polish church or Saturday schools aiming to link up with local public services were organised. Apart from these initiatives there was little practical help available, for instance in the form of emergency accommodation for migrants who found themselves homeless. Arguably, such efforts were hampered by a considerable cultural chasm between various waves of Polish migrants in the UK and in particular between the post-war political refugees and post-enlargement "labour-market-driven migrants" endorsing solely "work-based identity" (Kolankiewicz 2007: 78, 81). As Kolankiewicz (2007: 79) argues "in many cases the old Polonia and their institutions is part of the 'other' against which new migrant identities are being shaped". One can argue that as far as the Polish community in the UK is concerned there is a considerable deficit of "moral co-responsibility rooted in diaspora" (Kolankiewicz 2007: 83).

However, the relative void in ethnic safety nets was quickly filled in by the rise of profit-driven, ethnic entrepreneurs and businesses focused on providing advisory, financial, entertainment, media and other goods and services to Polish migrants, including advice on claiming benefits and using public services (Garapich 2008). Secondly, one can discern a number of new non-profit organisations and initiatives set up by activists who do not have close ties with old émigré milieu and often are newcomers themselves. For instance one can mention the new Polish Saturday schools and playgroups which have sprung up across London and the activities of Polish non-governmental organisations which help Polish homeless people in London.

4.5 Take-up of British social entitlements by Polish migrants in light of official statistics

The principles of market citizenship underpinning the doctrine of European citizenship are discernible in the types of social entitlements that Polish migrants residing in the UK are able to access. In 2007/08, three to four years after Poland's accession to the EU, the official statistics of the take-up of social rights by Polish citizens in Britain showed the impact of various restrictions. The last section of this review offers a snapshot of the collective position of Polish migrants as British social citizens at the time of the qualitative fieldwork for this study, in 2007/08.

The reporting of quantitative evidence of immigrants' access to host public services and benefits is often accompanied by methodological caveats such as the arbitrariness of definitions and categorisations. It is often framed in a cost-benefit discourse trying to assess whether the host society experiences net profits or losses as a result of the presence of immigrants. Some analysts argue that migrants in general tend to be net-contributors to the UK public purse (Sriskandarajah, et al. 2005). Another study found that in each fiscal year since 2004 enlargement migrants from EU8 countries contributed more in UK taxes than they took out in benefits and services, despite having on average lower wages than natives and thus paying lower amounts in tax. This was due to EU8 migrants having higher labour force participation rate, paying proportionately more in indirect taxes, and making less use of benefits and services than natives (Dustmann, et al. 2009). In particular Dustmann and colleagues (2009: 1) analysed, amongst other things, the UK LFS for the period of 2005-2009 and found that "A8 immigrants (...) are 60% less likely than natives to receive state benefits or tax credits, and 58% less likely to live in social housing. Even if A8 immigrants had the same demographic characteristics of natives, they would still be 13% less likely to receive benefits and 28% less likely to live in social housing".¹⁰⁸

Other studies also showed that Polish migrants in the UK have some of the lowest take-up of social housing compared with other foreign-born and UK-born categories of residents (IPPR 2007; Rutter and Latorre 2009). Rutter and Latorre (2009) analysed the LFS data from 2005 to 2007 and noted that migrants who arrived to the UK within last five years have a very different housing tenure profile from UK-born population, with a

¹⁰⁸ On the other hand, the anti-immigration lobby emphasises the net losses of migrants' presence to the host public purse, for instance by stressing the costs of UK-born children of immigrant and mixed households (Migration Watch 2006).

predominance of private renting among the former and of owner occupation among the latter. The take-up of social housing among Polish migrants was particularly low compared with the UK-born population and some other foreign groups (Rutter and Latorre 2009: 25-26). Researchers also found that social housing allocation procedures used by English local authorities are not biased in favour of newcomers, despite popular misconception (Rutter and Latorre 2009).

Despite the lack of clear data on the use of health services, a number of reports reverberated through the local and national media about citizens from EU8 countries putting pressure on health services. A leaked government report, predating the 2007 EU enlargement, allegedly warned that “Eastern European patients are also already “blocking” hospital beds because they are ineligible for social care and benefits if they leave” (Tempest 2006). In addition there were reports about the pressure on maternity services and provision of interpreters (BBC 2008; Easton 2008).

Finally, naturalisation statistics confirm that in the immediate years following Poland’s accession to the EU the majority of Polish migrants engaged with the British welfare system in the capacity of European citizens, and not as naturalised British citizens. Home Office data showed a drop in naturalisations of Polish citizens after 2004 (see Appendix 13). In particular in 2008 despite being the single largest group of foreigners residing in the UK amounting to nearly 12% of all foreign citizens residing in the UK (Salt 2008: 41), only 250 Polish migrants received a UK passport that year, which represented just 0.2% of all grants of British citizenship (HO 2009e: 15). These figures echo the findings of qualitative studies (Rutter, et al. 2008; see also Chapter 5.5) which suggest that Polish migrants do not see any immediate benefits to acquiring British citizenship.

I have chosen to present a snapshot of the welfare situation of Polish migrants in the UK in 2007 and 2008 in comparison with other nationality groups residing in the UK at the time. In order to offer such inter-group comparison I analysed five UK Labour Force Survey quarterly datasets covering the period from January 2007 till March 2008 (see Appendix 14). Furthermore selected DWP, CORE, and ONS statistics, offering absolute numbers of benefits applications, social tenancies and births to Polish mothers in the UK are also reviewed below.

Welfare benefits

The absolute numbers of applications for selected British welfare benefits by EU8 citizens are published regularly in the Accession Monitoring Reports (HO 2009f).¹⁰⁹

The impact of eligibility restrictions is apparent in that the rejection rates for so called out-of-work benefits are much higher than those for tax credits or Child Benefit. In the period from May 2004 till December 2008 82% of applications for Income Support were rejected compared with only 11% of applications for tax credits (see Table 1). The main reason of rejection was failing the right to reside test.

Table 1. (DWP, HM R&C 2004-2008), Applications for selected UK welfare benefits from EU8 citizens and rejection rates

Benefit name	Number of applications received	Rejection rate
Income Support	12,818	82%
Income-based Jobseeker's Allowance	21,805	72%
Pension Credit	752	63%
Child Benefit	194,914	20% ¹
Tax credits (WTC & CTC)	111,509	11%

¹includes withdrawn claims

Source: (HO 2009f: 23-26).

However the relative propensity of EU8 citizens and in particular Poles to claim benefits can be assessed only by comparison with other residents of the UK.

Examination of the 2007/08 LFS data concurs with earlier findings showing that UK nationals are twice as likely to claim benefits as Polish citizens residing in the UK. According to the 2007/08 LFS 21% of Polish citizens declared claiming any state benefits compared with about 42% of UK nationals (see Table 2).

¹⁰⁹ The reports contain collated information on the applications for income –based Jobseeker's Allowance, Income Support, Pension Credit, administered by the Department for Work and Pensions, and Tax Credits and Child Benefit, administered by HM Revenue and Customs. The reports do not contain data on Housing Benefit and Council Tax Benefit applications, administered by local authorities.

Table 2. (LFS 2007/08), Persons claiming any state benefit or tax credit in a given week by citizenship

Citizenship	Proportion of Claimants	Sample total ¹
EU2 ²	7%	89
EU7 ³	17%	473
Poland	21%	1,057
Other non-UK	29%	5,759
EU16 ⁴	37%	2,390
UK	42%	135,172

¹ Pooled total of surveyed persons aged 16-69 or in paid or unpaid work, excluding cases with missing data, unweighted

² Bulgaria and Romania

³ Czech Republic, Estonia, Hungary, Latvia, Lithuania, Slovakia, Slovenia

⁴ Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Malta, Netherlands, Portugal, Spain, Sweden

Source: LFS 2007/08.

Furthermore Polish citizens claimed predominantly family related or in-work benefits. About 16% of Polish adults claimed Child Benefit and 12% – tax credits (see Table 3). Despite a younger age distribution and higher employment rates (see Appendix 15), the proportions of Polish citizens claiming these benefits were still below the equivalent percentages of British citizens, which suggests a considerable gap in take-up. Furthermore the take-up of unemployment, disability, housing related benefits and state pension by Polish citizens was negligible compared with corresponding shares among UK citizens (see Table 3).

Table 3. (LFS 2007/08), Persons claiming particular benefit by citizenship

Citizenship	Unemployment benefits, NI credits	Income Support (not as unemployed person)	Sickness or disability	State pension	Child Benefit	Housing/ Council Tax GB, Rent / rate rebate NI	Tax Credits	Other	Sample total ¹
EU2	-	-	-	-	5.6%	-	3.4%	-	89
EU7	1.3%	0.8%	0.6%	0.2%	14.0%	3.0%	8.2%	0.4%	473
Poland	0.3%	0.5%	0.1%	0.3%	16.4%	2.3%	11.6%	0.4%	1,057
EU16	1.3%	4.1%	3.5%	11.8%	19.6%	6.2%	11.2%	1.2%	2,390
Other non-UK	1.9%	5.4%	2.7%	3.0%	18.2%	7.2%	10.6%	1.4%	5,759
UK	1.5%	4.7%	7.4%	12.3%	19.5%	6.7%	13.4%	1.5%	135,172

¹ Pooled total of surveyed persons aged 16-69 or in paid or unpaid work, excluding cases with missing data, unweighted

Source: LFS 2007/08.

Thus the LFS figures show that Polish migrants have a lower propensity to claim state benefits compared with UK citizens, citizens of ‘old’ EU16 countries and non-EU citizens residing in the UK. Furthermore Polish claimants consist predominantly of claimants of Child Benefit and tax credits. However these figures reflect the combined effect of eligibility criteria and social characteristics of Polish migrant group in 2007/2008 which may change in the future. Interestingly, when one compares citizens

of ‘old’ EU16 countries with UK citizens one can note that the proportions of claimants of particular benefits in both these categories are remarkably similar (see Table 3).¹¹⁰ Thus one can hypothesise that in time, as Polish migrants age and as their social rights become more robust it is likely that the profile of claimants among Polish citizens will approximate that of ‘old’ EU category.

Social housing

Restrictions were even more evident when it comes to the number and proportion of social tenancies among Polish citizens residing in the UK. According to CORE data during 2006/7 and 2007/8 a total of 1,943 new lettings in both general needs and supported housing were made by local authorities and housing associations in England to Polish citizens (CORE 2006/07a; CORE 2006/07b; CORE 2007/08a; CORE 2007/08b).¹¹¹ This represents just over half of all new lettings to EU8 citizens and about 0.5% of all new lettings reported during this period in England.

The condition of economic activity, guarding access to social housing, impacts particularly migrants who face difficulties in finding a job. Out of 4,572 applications for homelessness assistance submitted between May 2004 and December 2008 in England by EU8 citizens 64% were rejected (HO 2009f: 27). Thus the Audit Commission (2007: 9) report noted that “the combination of open borders and a limited entitlement to benefits means that migrants who fail to find jobs, or who lose their jobs unexpectedly, can become homeless and destitute.”

The low prevalence of social housing among Polish citizens residing in the UK is also reflected in the LFS data. In 2007/08 about 80% of Polish citizens rented privately (see Table 4).¹¹² In contrast, only 7% of Polish citizens in the UK (and 5% in London) rented their accommodation from a social landlord compared with about 17% of British citizens in the UK (and over a quarter of Londoners with UK citizenship).

¹¹⁰ Citizens of Ireland, France, Germany, Italy and Portugal constituted nearly 80% of respondents in the EU16 category.

¹¹¹ This figure reflects only social lettings made by social landlords who participate in the CORE recording system. It includes lettings to persons deemed to be ‘statutorily homeless’.

¹¹² This figure does not differentiate between renting from private landlord and sub-renting. A survey of Polish migrants in the UK and Ireland found that about 30% of Polish migrants occupied their accommodation in a position of sub-tenants and 57% rented directly from a private landlord (Garapich and Osipovič 2007).

Table 4. (LFS 2007/08), Persons by housing tenure, citizenship and place of residence (UK and Greater London)

Citizenship	UK & (London) ⁵					Other ²	Sample total ¹
	Owned ⁶	Rented from					
		Social Landlord ⁴	Private Landlord	Other Landlord ³			
EU2	20% (7%)	5% (4%)	72% (84%)	4% (5%)	-	106 (86)	
EU7	15% (23%)	13% (11%)	65% (62%)	7% (4%)	-	556 (141)	
Poland	8% (12%)	7% (5%)	79% (80%)	6% (3%)	0.2% (-)	1,296 (279)	
EU16	57% (44%)	16% (20%)	24% (33%)	3% (3%)	0.2% (0.1%)	3,157 (1,002)	
Other non-UK	38% (29%)	21% (29%)	35% (38%)	6% (3%)	0.3% (0.4%)	7,319 (2,604)	
UK	74% (64%)	17% (26%)	7% (9%)	2% (1%)	0.3% (0.6%)	202,459 (17,186)	

¹ Pooled total of surveyed persons, excluding cases with missing data, unweighted

² part rent, part mortgage or squatting

³ employer, another organisation or relative rent free

⁴ Registered Social Landlords (housing associations and cooperatives) and local authorities

⁵ In brackets the corresponding figure for Greater London

⁶ outright or with mortgage

Source: LFS 2007/08.

Housing researchers note that migrant households have “housing careers” which are affected by the individual’s lifecycle stage and a host of other factors (Özüekren and van Kempen 2002: 365). Arguably in the case of Polish newcomers in future one can expect an outflow from the entry tenure of private renting to the more secure tenures such as owner occupation and to a smaller extent social renting. Such shifts are discernible when one examines housing tenure by migrants’ length of stay in the UK. Whilst Polish migrants who are the most recent arrivals predominantly rent their accommodation privately, already a quarter of those who arrived in the 1990s and early 2000s owned a property and 16% rented from social providers (see Table 5).

Table 5. (LFS 2007/08), Polish citizens by housing tenure and period of arrival to the UK

Period of arrival	UK					Other	Sample total ¹
	Owned	Rented from					
		Social Landlord	Private Landlord	Other Landlord			
Pre 1988	69%	28%	3%	(-)	(-)	35	
1989 - 2003	25%	16%	57%	2%	(-)	159	
2004 - 2008	3%	5%	85%	7%	0.3%	1,053	

¹ Pooled total of surveyed persons, excluding cases with missing data, unweighted

Source: LFS 2007/08.

Healthcare

In comparison with welfare benefits and social housing statistics, there is a dearth of data on usage of the NHS services by Polish and other EU8 citizens. Although a patient’s town and country of birth are recorded on the GP registration form, no

aggregate statistical outputs are publicly available on this basis.¹¹³ A recent large scale study into sexual attitudes and lifestyles of East Europeans in London found that about 45% of men and 67.5% of women from EU8 countries were registered with a GP (Burns, et al. forthcoming). Researchers also found that there are no significant differences between Polish and other EU8 respondents for this indicator.

Due to the young age structure of Polish migrants one can plausibly expect that they are on average fitter and healthier than British citizens. This is reflected in the 2007/08 LFS data according to which only 2% of working age Polish citizens residing in the UK had some degree of long-term health problems that substantially limited either their day to day activities or working lives or both compared with about 20% of working age British citizens (see Table 6).

Table 6. (LFS 2007/08), Persons by disability status and citizenship

Citizenship	Not disabled	Work-limiting disabled only ²	DDA disabled only ³	DDA disabled and work-limiting disabled ⁴	Sample total ¹
EU2	99%	-	1%	-	90
EU7	96%	1%	1%	2%	475
Poland	98%	-	1%	1%	1,057
EU16	86%	3%	3%	8%	2,062
Other non-UK	89%	2%	2%	7%	5,547
UK	80%	3%	4%	12%	117,374

¹ working age persons (men aged 16-64 and women aged 16-59), excluding cases with missing data, unweighted

² persons who have a long-term (lasting more than 12 months) health problem which affects the kind or amount of work they might do

³ persons who have a long-term (lasting more than 12 months) health problem which substantially limits day-to-day activities (as defined in Disability Discrimination Act 1995)

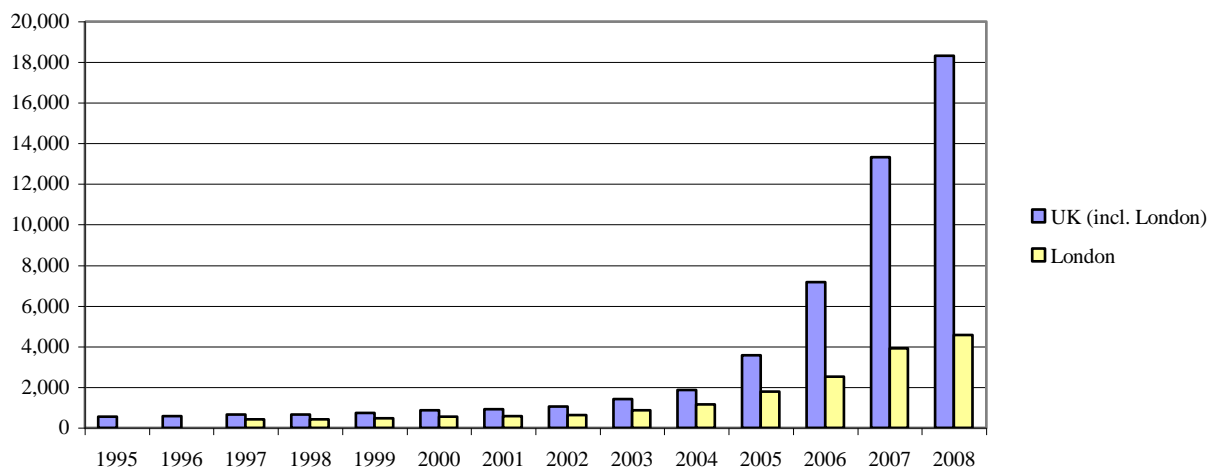
⁴ persons whose disability limits both day-to-day activities and work they might do

Source: LFS 2007/08.

As the majority of Polish migrants are aged 20 to 34 (see Appendix 15), one can also expect to see a rise in births to Polish parents in the UK. The ONS births statistics indicate that whilst in the second half of the 1990s the number of births to Polish born mothers in the UK was below one thousand a year, this figure increased significantly after 2004 EU enlargement (see Figure 5). In particular in 2008 there were 18,326 babies born in the UK hospitals to Polish born mothers. The overwhelming majority of these births – 16,101 – occurred in England and Wales, where in 2008 births to Polish women comprised the second highest figure among foreign born mothers residing in the UK after Pakistani women (ONS 2009b).

¹¹³ This information has to be requested separately from each Primary Care Trust.

Figure 5. (ONS 1995-2008), Yearly births to Polish-born mothers in the UK and in London



Source: (ONS 2009a).

These results indicate that many Polish women decided to establish or enlarge a family by having babies during their stay in the UK. Yet as Tromans and colleagues (2009: 35) note “the increasing number of births to Polish women does not necessarily imply that they have higher fertility than UK born women; rather that there are more of these women living in the UK than previously.”

Overall it is important to stress that Polish migrants’ engagement with the British welfare state is a dynamic process. Thus it is likely that their position vis-à-vis the British welfare state will change in future, for instance as result of more people acquiring permanent residence status or British citizenship, deciding to return or due to other changes in the group’s socio-demographic and socioeconomic composition.

4.6 Summary

As Ferrera (2005: 47) notes, the acquisition of social rights by immigrants in a host country is conditioned upon accumulating the predefined periods of residence, work or national insurance contributions. As the policy overview showed the acquisition of British social rights by Polish migrants is not simply a matter of length of stay. On the contrary, a hypothetical Polish person, who arrives to the UK, finds work and registers with the WRS can apply for tax credits or Child Benefit straight away, but they face the risk of losing these entitlements, if they lose their job within the first year. Furthermore migrants who stop working after a year of registered employment can count only on support in the form of Jobseeker’s Allowance.

Thus maintaining economic activity during the first five years of residence in the UK in the capacity of an EU citizen is essential for retaining eligibility for British non-contributory welfare benefits and social housing. Yet this creates a somewhat paradoxical situation as the rules deny social assistance to those who need it most, and offer it to those who are unlikely to need it (Currie 2006: 220-221). Thus the economic activity condition of social entitlements is bound to cause some hardship in individual cases, in particular among migrant workers in unstable, intermittent employment and among women who may have to take breaks from economic activity due to caring responsibilities. Acquiring permanent resident status after five years of continuing residence, in principle, should guarantee unconditional access to the British welfare system. Access to the British healthcare system, due to the fundamentally different principles on which NHS was founded, is far more liberal. It is predicated on the ability to demonstrate lawful and intentionally settled residence, which is decoupled from the economic activity element.

This picture is not altered by the home country policies in any significant way. As apart from the EU-wide principles of coordination of social security entitlements, there are no Polish social policy instruments targeting specifically Polish migrants abroad.

In light of such a policy framework, official statistics indicate that the take-up of British welfare benefits and public services by Polish migrants in the three to four years following the 2004 EU enlargement remained lower in comparison with other categories of British residents. Apart from eligibility restrictions, the socio-demographic composition of the Polish migrant group, namely young age structure and lack of health problems, explains the lack of take-up of pensions and disability benefits. At the same time the family formation stage and high employment rates underpin a considerable take-up of family and in-work benefits. However one ought to emphasise that this collective picture reflects only the initial stage in the process of engagement with the host welfare state and is likely to change in future.

One can argue that the structural conditions reviewed reveal only part of the story. The collective outcomes, as seen in the official statistics, are influenced not only by eligibility criteria and group demographics, but also by individual preferences. Some Polish migrants may not want to engage with the British welfare system either due to general negative views of state welfare or dissatisfaction with specific policy solutions. In the next chapter I treat the structural constraints more or less as givens and focus

instead on migrants' views and actions.¹¹⁴ I analyse the reasons behind the decisions and choices, with regard to satisfying specific welfare needs, made by the participants in this study and the formal and informal institutions that helped them to act on their preferences.

¹¹⁴ The dual dependency of Polish migrants' actions on both individual and structural factors has been captured by the columnist of a Polish magazine published in London who writes: "B for Benefits, or services: aid, allowances... the dole. With respect to this emigrants are split into four groups (pay attention): those who can but don't want; those who want but can't; those who neither can nor want; and those who want and can" (Rujna 2009: 20).

Chapter 5. Polish migrants within and outside the British welfare state: exploring the logics and practices of engagement and non-engagement

5.1 A note on the processual understanding of agency

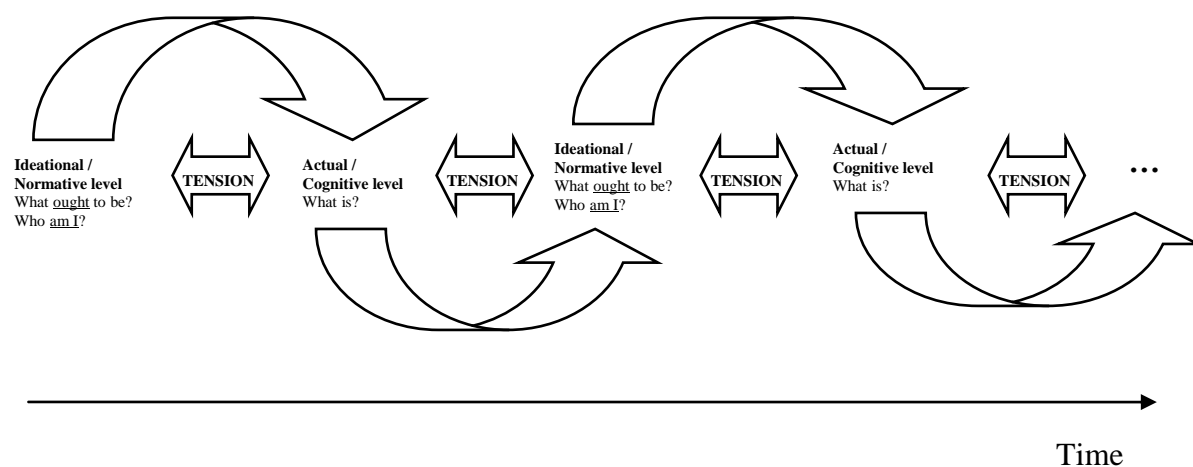
This chapter explores the ways in which social citizenship is experienced in everyday life by ordinary citizens, which is the prime concern of this research. The concept of migrant agency which emerges from the narratives corresponds closely with the understanding of human agency as a tension between the ideal and the real outlined in Chapter 2. Applied to engagement with the host social citizenship, this view of agency implies that whether a person experiencing certain welfare needs chooses to engage with the formal welfare system or not partly depends on how they view their own position in Britain. For instance, the self-image of a contributing citizen with a strong work ethic underpins the desert-based logic of engagement with the welfare state. On the other hand, the self-image of a pure migrant worker following the market logic attains to non-engagement. The latter entails looking for private solutions to one's welfare needs, either by purchasing them on the market or relying on informal, unpaid care.

The logics identified on the basis of the interviews summarise different ways of thinking about one's position in Britain and the rationale of migration, as well as accompanying attitudes. In their empirical instantiations, they represent a shifting terrain constantly under construction. One person can shift from one logic to another successively or employ various aspects of different logics simultaneously. Thus the conceptualisation of the participants' experiences in terms of logics and practices of engagement and non-engagement is not an attempt to categorise the actual participants in a reified typology. It is rather an attempt to see to what extent the identified normative logics or ways of thinking help to explain the actions of participants in relation to the British welfare system.

As the ways of thinking consolidate as a result of past experiences, it would be equally plausible to argue that the participants' engagement with the British welfare system shapes the logics of engagement. Yet it is likely that each cycle of re-shaping results in modified logics and not exactly the ones with which an actor began. Thus in order to

avoid the unhelpful conflation of agency and structure, it is important to conceive human agency as the process that follows a linear unfolding of stages or qualitative shifts (Archer 1996). Similarly, Strauss and Corbin (1998 [1990]: 165) note that “action/interaction evolves or can change in response to shifts in the context. In turn, action/interaction can bring about changes in the context, thus becoming part of the conditions framing the next action /interactional sequence.” Figure 6 represents the model of agency discussed in Chapter 2 which takes into account such sequential interplay between structure and agency.

Figure 6. Processual (sequential) model of agency



Source: own elaboration based on Dawe (1978) and Archer (1996).

The analysis presented in this chapter is an outcome of a multistage coding of interviews focusing various themes around the central category of engagement. Although the conceptual causality runs in some aspects in both directions, I have chosen to present the material by outlining first the logics articulated by participants followed by the practices which such logics legitimated and accelerated. However as a prelude to this it is worth outlining the participants’ perceptions of the British welfare system shortly before or at the stage of implementing their moves to Britain, their ‘starting position’.

5.2 Entering a new welfare context

Since the formulation of the first mobility conceptualisations, scholars of migration observed that migrants are not a random representation of their home populations, but are in some way self-selected (Lee 1966). However various factors such as individual lifecourse stage, personal resources, migration policies, social networks and recruiting agencies, all affect selectivity in complex ways. As far as the post-EU enlargement

emigration wave from Poland is concerned, the studies found that men, people aged between 20 and 40, people with vocational education, and those with tertiary education tend to be overrepresented in the stream of emigrants from Poland compared with the general Polish population (Grabowska-Lusińska and Okólski 2008; Mioduszevska 2008). Although men tend to outnumber women (by about 60% to 40% in 2007), Polish women emigrants tend to be better educated and younger than men (Kępińska 2007: 10, 43).

The direction of attitudinal selectivity in terms of adherence to individualism or collectivism, liberal or traditional values is even more difficult to assess than selectivity in terms of socioeconomic characteristics. This is because of the lack of longitudinal or experimental data that would allow the capture of the ‘before and after’ attitudes, which are fluid and prone to change especially as a result of new experiences. One can hypothesise that individuals who decide to move abroad may be more self-reliant, entrepreneurial, individualistic, and prepared to take risks than the average Pole. However it is impossible to verify this assumption on the basis of collected empirical material as one cannot assess to what extent such views were formed prior to the event of migration or as a result of it.¹¹⁵

Individuals who decide to move abroad enter a completely new societal context. This usually means that their baggage of everyday knowledge and normative ideas, shaped in the home country, has to be rather rapidly adjusted to the new context. For instance, the ‘old’ context attitudes and expectations towards state provided welfare may impact on initial ways of engagement with the British welfare system. However they are likely to be incongruous with the expected ways of doing things generated by the British welfare system. Thus the ‘old’ attitudes undergo a morphing process into the ‘new’ norms as a result of initial dissonant experiences. One can argue that individual’s cognitive and learning abilities aided by the knowledge of local language play a vital part in person’s successful navigation of the new social structure.

Unlike the difficulty with assessing participants’ attitudes towards welfare before their arrival to the UK, there was more information about participants’ ‘objective’ position as social citizens in Poland. Only a few participants claimed unemployment or family benefits in Poland. The Polish family benefits were perceived as meagre, as “*peanuts*

¹¹⁵ Such an assessment is further complicated by the coexistence of contradictory attitudes both at the collective and individual level. Marody (1987: 98-99) argues that Poles are prone to “continuously oscillate between the view that everything is possible and the view that nothing can be done”.

[śmieszne pieniądze] (...) not enough even for Pampers” (Kasia). However as family benefits are not portable, these had to be stopped by participants before going abroad. In contrast, contributory benefits such as pensions can be drawn whilst residing abroad. Five participants indicated that they claimed the Polish retirement pension and one participant claimed an industrial injuries benefit whilst residing in London.

Despite voiced dissatisfaction with the low level of Polish social entitlements, interviews provide no evidence that this served as a push factor. On the contrary, in the case of older participants the Polish welfare system acted as a pull factor postponing the timing of the implementation of the decision to migrate to Britain until the acquisition of pension entitlements. Some scholars argue that before engaging in mobility individuals pay some attention to the potential costs of foregone benefits (Fischer, et al. 1997). One can add that such costs fluctuate throughout individual’s lifecourse and are particularly high for older people. Thus it is understandable that participants who were approaching retirement age in Poland and considering a move to Britain as informal carers weighed their options carefully:

“My daughter has been pressing [namawiała] me a long time (to come), but I couldn’t... because well, because really, I wouldn’t have anything for my old age, you know. And there was a moment when my company ... somewhat collapsed, there were redundancies, and if anybody qualified for anything, they had to go, and I qualified for this pre-pension benefit [zasilek przedemerytalny] as I had 34 years of work, so I left ((sigh)).” (Janina)

Contrary to the welfare tourism hypothesis (see Chapter 2.4) the constitution of the British welfare system did not feature at all in the participants’ deliberations of mobility. As it has already been discussed the prime motives of migration to the UK were financial, occupational or work related, and to a lesser extent family oriented ones. There was a strong sentiment shared by the majority of respondents that the purpose and rationale of their coming to Britain was to work and earn money. Waclaw, a builder in his 50s, was particularly adamant and fairly typical in expressing his labour market oriented motivation of coming to the UK:

“I knew that I was coming to work, not for benefits, not for a holiday. Just for work.” (Waclaw)

Unlike finding out about job prospects, accommodation options and costs of living, the majority of participants had no information about the set-up of British public services prior to migration, at the inception of their stay in Britain and some even at the time of interview. This is because they neither actively searched for nor passively came across

such information. Only one participant admitted having done some research into tax credits and Child Benefit whilst still in Poland. Joanna knew that she would not be able to work straight away because of the need to take care of a few months old baby. So, before joining her husband in London, establishing whether her family would have enough means to survive in London was crucial:

“It is difficult to know the amount, but we knew that there is... hmm... child benefit, we knew this, we knew that there is something like tax credit and working tax credit and that they calculate this; I have searched all internet forums.” (Joanna)¹¹⁶

Generally participants began to look for relevant information when their welfare needs increased for instance as result of family unification, arrival of a baby, illness or accident. As Marzena noted *“when we need something, only then we begin to take interest in what we can, and where to look for it”*. Yet as obtaining information incurs a cost – of time, effort, and in some cases money – many participants also experienced an ‘individual’ time lag between an occurrence of a particular life event and the time when information about available support reached them. This is in addition to the ‘communal’ or ‘collective’ time lag in availability of information about British social entitlements within the Polish migrant group. As Renata observed:

“I think many Poles when they come at first they simply don’t know that they are entitled to some things, it was only after a while, that we’ve found out.” (Renata)

Thus one can argue that the welfare tourism thesis underestimates the difficulties of obtaining the right information about the complex system of welfare provision at the outset of migration and confuses the priorities that newcomers have upon arrival. The knowledge about the host welfare infrastructure is diffused among newcomers with a considerable ‘collective’ and ‘individual’ time lag and is sought after by individuals, when they have specific welfare needs.

To sum up, participants arrived to London carrying some opinions of state welfare formed in the Polish system, yet no preconceptions or expectations of the host welfare system. Also unlike post-colonial migrants, Polish labour migrants had no a priori legitimating bases such as historical ties or redress of injustices in which to anchor their normative claims towards the British welfare state. Instead the majority arrived as fully fledged market players.

¹¹⁶ Since Joanna represents one of the latest post-EU accession arrivals among the participants, it is possible that information about British welfare benefits gradually became more widely available via the internet, diasporic press and social networks.

5.3 The logics of non-engagement

Due to the labour market or family oriented rationale of migration, non-engagement with the British welfare state is the straightforward way of thinking that characterises labour migrants. As it is also analytically prior to the logics of engagement it will be discussed first. However one should emphasise that the differentiation between non-engagement and engagement is not a categorical one, distinguishing one set of participants from another, but purely processual, indicating various ways of thinking and acting that any single individual may adopt during their stay in Britain.

What are the factors of non-engagement with the British welfare system? The eligibility rules outlined in Chapter 4 explain why some Polish migrants cannot engage with the welfare system but do not address the question why some participants may not want to engage. I argue that non-engagement is partly predicated on not seeing oneself as a social citizen in British society. Instead, on the basis of the interviews, I distinguished three self-images or logics underpinning the non-engagement – the market, care and indeterminate logics with a respective, dominant self-perceptions of ‘a pure migrant worker’, ‘a commuter carer’ and “*a resident for a moment*” (Ola). When welfare needs arise such individuals tend to look for ways of satisfying them outside of the formal welfare system.

Market logic

A significant number of participants, especially men in both documented and undocumented employment, perceived themselves as ‘pure migrant workers’ in Britain. They could be described using Bauman’s term as the epitome of flexible labour (Bauman 1998: 104-5; 2001: 118). Participants were ready to deploy their labour speedily in various locations in response to the changing market conditions, including if necessary “*to change the country*” (Franek). They expected to satisfy all their welfare needs by participating in the market game, and they did not expect any help or protection from the state. They were prepared to bear all costs privately if ‘things go wrong’ rather than collectively share such risks by belonging to a welfare community. For instance Zbigniew stated that he was used to relying on his own hands and was “*capable of working for his needs*”. As they emphasised the work-oriented nature of their stay in London they also asserted their intention of going back to Poland in the event of debilitating illness, accident or prolonged unemployment rather than looking

for help in the UK. Claiming benefits was simply not compatible with the rationale of their migration to Britain:

“If there was a situation that I don’t know, I did not have anything to eat, then I would fuck off [spieprzał] to Poland, I don’t know whether I would chase benefits here.” (Sebastian)

“If I did not have a job I would go back to Poland.” (Zenon)

Kazik advocated that the responsibility of protecting oneself from the social risks of accident or incapacity lies with workers themselves rather than with Britain or Poland as *“they should have insured themselves, by paying into some funds”*.

Often this self-image was accompanied by the attitudes of self-reliance, entrepreneurship, and general anti-welfare views. For example Paweł and Zbigniew held libertarian views advocating tax cuts, reducing social welfare and postulating the minimal state intervention in the economy and society:

“If you want something, you should pay. (...) what’s private is good, no dictate of the state, nothing.” (Zbigniew)

“As few taxes as possible, everyone has to manage on their own, fewer restrictions.” (Paweł)¹¹⁷

Interestingly the labour market status in Britain of participants like Paweł, Zbigniew, or Sebastian was precarious, characterised by low wages and temporary employment contracts interspersed by frequent periods of unemployment. They adhered to a strong work ethic which was nevertheless very individualistic and stripped of any collective dimension. Such a neoliberal personality of migrant workers from post-communist countries was also noted in other studies (Křešāne 2009). Internalisation of such ways of thinking exposed the agentic limits of incorporation into the social citizenship framework. They did not exclude the possibility of engagement in principle, but only on opportunistic grounds and upon pragmatic calculation of individual costs (of time, effort, money, lost earnings) and benefits.

Documented workers

Market logic characterised both documented and undocumented workers. Documented workers comprised participants who were employed in low wage, ‘flexible’ labour market sector and those who already experienced occupation mobility in Britain, making a leap from entry level jobs to better paid, stable employment, often according

¹¹⁷ Both participants mentioned that they share some views of the radical, right-wing Polish politician Janusz Korwin-Mikke.

to their qualifications. These were relatively young and well-educated participants who were driven by the ambition of achieving financial stability and independence in London. For them, not drawing on benefits was a matter of “*setting a crossbar*” high as Emilia put it. They were also aware of the negative aspects of relying on state welfare such as benefits traps, welfare dependency or antisocial behaviour on some council estates. They were prepared and able to spend money to retain choice and control over their wellbeing and generally aimed for a “*higher standard*” (Michał).

Undocumented workers

Undocumented employment is a complex phenomenon. A comprehensive discussion of structural conditions that sustain undocumented migrant employment on both the demand and supply side goes beyond the scope of this thesis (see Ahmad 2008; Engbersen, et al. 2006; Jordan and Düvell 2002). Many participants admitted that their first job in London, even if it was after EU enlargement, involved some form of informal payments. Women participants were most often employed as undocumented domestic workers and cleaners, whilst men as casual labourers in building and construction. As newcomers they accepted undocumented employment partly because of the lack of choice and partly because they often planned only a short stay in London at the outset:

“When one arrives one doesn’t care whether one will have a legal or illegal work, but simply just to have a job and to earn a livelihood [utrzymanie].”
(Kasia)

“I used to work illegally as a nanny, and I wasn’t interested, it was better for me to get all money ‘cash in hand’, this what I cared about then (...) I used to say, good, this is just for a moment, for a while.” (Mariola)

In order to understand the rationale of non-engagement one needs to examine the benefits of undocumented work and the costs of regularisation from the agent’s perspective. The regularisation of employment did not make economic sense for low paid participants unfamiliar with the system of tax credits. In particular the costs seemed to outweigh the benefits to self-employed participants when jobs were scarce but national insurance contributions still had to be paid.

Furthermore in times of economic boom and labour shortages undocumented employment does not necessarily make one financially worse off compared with migrants who do similar work legally (Ahmad 2008). On the contrary, undocumented status may even provide a better bargaining position in confrontation with a prospective

employer. For example Zenon, a manual labourer in construction, would demand a higher hourly wage which would include the ‘saved’ overhead costs of taxation:

“If it is illegal then he would have to pay me £15. I would demand this from an employer that he pays me more if he does not pay taxes for me.” (Zenon)

Thirdly, by functioning solely in the shadow economy, aided by a host of informal institutions such as illegal ‘job centres’, so called “*stójki*”¹¹⁸ (Franek), ethnic gangmasters, and housing tenures such as subrenting or squatting, undocumented workers gain the ability to adjust their course of action fast to changing circumstances.

Due to the fact that undocumented employment is facilitated by a number of institutions, tolerated by a host society and, notwithstanding risks, offers also some benefits to individuals, to some male participants it became more than just a temporary strategy. Franek, Paweł, Dawid and others had years of undocumented work experience in various countries such as the US, Norway, Israel and Britain. Even though the participants were aware of the dangers of long-term undocumented employment, especially as one ages, describing it as akin to “*kicking oneself in the ass*” (Paweł) they would not turn away an informal job offer:

“Sometime in future 90% of Poles will get the hiccups (...) if one returns to Poland, one will want a pension for these years of work, or from England. It is clear that ZUS will want some papers. ‘I worked, I worked my ass off [zapierdziałalem jak wół]’ ‘And papers?’ ‘I don’t have any because they weren’t giving any’. Nobody takes care of themselves. I am not saying... Me too, me too, if there is a job, I go, I earn. Pure cash. Here it is.” (Zbigniew)

One can argue that undocumented employment makes perfect economic sense for a short-term labour migrant with no dependants. It represents a gamble that an individual is prepared to take. However, due to a certain in-built path dependency, it may become habitualised. This explains the paradox of why some migrants remain ‘illegal’ even when all political barriers have been lifted as in case of Polish migrants in the UK.

Semi-compliance

Actual labour market statuses of participants are not easily compartmentalised into neat types. A number of participants were neither documented nor undocumented workers

¹¹⁸ ‘*Stójki*’ describe a practice of job hunting by congregating in certain places (streets corners etc.) and waiting for offers of casual jobs. Participants mentioned several such places around London, including the famous ‘Wailing Wall [*Ściana płaczu*]’ in Hammersmith.

but would be best described as “semi-compliant” (Ruhs and Anderson 2006: 10).¹¹⁹ For instance Roman had an official contract as an agency worker and combined it with odd undocumented jobs obtained through social networks. Monika and Tomek were both full-time employees with reputable employers and paid taxes but they chose not to register with the WRS. Having encountered no such requirement from their employers (and even from an officer registering them for a NINo), they calculated that the registration does not pay off:

“We don’t like the fact that one has to pay £70, so we’ve decided, we don’t plan to take any benefits here, so we gave it a miss [olaliśmy to]” (Monika)

Arguably Monika and her partner followed the market logic. To them assessing usefulness of the WRS registration was purely a matter of economic calculation rather than a matter of abiding the law. Similarly Zenon regularised his self-employment purely because it no longer paid to be undocumented. As a registered self-employed he could claim tax deductions on incurred costs associated with self-employment.

If not for pragmatic reasons, regularisation was often induced by third-party coercion rather than done on one’s own initiative. A number of participants regularised their stay in Britain before EU enlargement because of the fear of deportation, whilst Paweł had to pay £90 to register with the WRS because his employer demanded it.

Being prepared to pay

Another disposition accompanying market logic is being prepared to pay for goods and services that one needs. Economic migrants expect no mercy and no welfare. They are paid and are prepared to pay. Every service has its price. Participants were accustomed to purchasing help with translation, job offers or doctor’s consultations. The discontent emerged not so much about the fact of having to pay but when the price was deemed unfair. For example Marzena broke an agreement with her gangmaster who was supplying her with undocumented cleaning jobs at the beginning of her stay in London:

“Taking £7, giving a worker for their work £3 and taking herself £4 for doing nothing, this wasn’t fair (...) she shouldn’t have been so greedy [pazerna]”.
(Marzena)

In Marzena’s opinion £2 an hour deduction from the £7 hourly rate would have been an acceptable price to pay for finding her work. Participants who did not know English

¹¹⁹ Ruhs and Anderson (2006: 10) define semi-compliance as instances “where migrants have valid leave to remain (...), but are in breach of some or all of the conditions pertaining to employment attached to their immigration status.”

relied on ethnic intermediaries for any unavoidable contacts with British authorities such as applying for NINOs. Waclaw paid £20 for help with filling in his NINO application, £5 for phoning to arrange a NINO interview for him, and £10 for interpretation during a NINO interview to a person whom he found through an advert in a Polish shop. When asked whether he ever enquired about the availability of free help he replied:

“I never enquired about this. No. Damn [kurde], why would I be interested in this since I’ve already met a girl; I go and sort out all things (with her). (...) Well, this is normal.” (Waclaw)

Care logic

A distinct way of thinking about one’s rationale of migration characterised five retirees who arrived to London with the sole purpose of helping out their adult children with running a household and bringing up their grandchildren. Among the participants interviewed such an arrangement characterised predominantly mothers and daughters and only in one instance a father and a daughter. Generally these participants did not envisage themselves as social citizens in Britain. Instead they had a self-image of a carer, a family member confined solely to the private, domestic sphere and playing no visible public role in British society. Their self-image was to a great extent transnational as they stressed on many occasions the temporal nature of their stay in London, regular commuting between London and Poland, and maintaining strong ties with Poland. Similar care provision practices of the so called “transnational flying grannies” have been observed in studies of Italian and Afro-Caribbean families in Britain (Plaza 2001: 229; Reynolds and Zontini 2006).

Granny versus nanny

Whereas market logic is motivated by the calculation of individual benefits, care logic is characterised by a high dose of altruistic behaviour often at the expense of individual preferences and comforts. One can note that for some such participants, the lack of public roles, confinement to the domestic sphere, combined with a lack of knowledge of English and longing for Poland were sources of frustration and isolation. For instance Danuta, who had many years of work experience in Poland in a managerial position, described her current position as *“a typical housewife [kura domowa], a granny”*.

Danuta, Maria, Janina and Stanislaw took on the childcare and household responsibilities which enabled their daughters to retain their involvement in the labour market and/or to pursue education:

“I do have with my daughter what I would call a healthy agreement. I do everything, absolutely everything at home. Because she goes to work, she is tired, she wants also to spend some time with the child. She has various administration matters to sort out. This is how it is. So I take care of the house and the child.” (Maria)

Needless to say their help was greatly appreciated by their children who wanted to retain them in London as long as possible. Expensive formal childcare and apprehension about leaving young children with an “*unfamiliar lady*” (Janina), made granny “*the cheapest*” (Magda) and the best solution. In particular, such help was a lifeline to single mothers for whom paid work was not only a matter of preference, but a necessary condition for accessing welfare benefits:

“My mum does very hard work, which is normally very well paid work. (...) thanks to mum’s help I am able to work, and this whole machinery [machina] is turning and functioning rather efficiently.” (Wanda)

This help was so vital that, once provided, the families could not easily cope without it. However some participants still had care responsibilities in Poland so they often had to make difficult choices between helping their daughters in London and attending to their elderly parents in Poland:

*“JANINA: Well, because really I am here only temporarily...
MAGDA: Theoretically (laughter)
JANINA: Theoretically... well no as I said... I have ... just, my dad is in Poland, and well ((sigh)) ... For sure when I am no longer needed here I will probably return... Well, at least I think so...
MAGDA: I cannot envisage this somehow
JANINA: There you go! ((laughter))
MAGDA: Granny is always needed (laughter)”*

Thus participants’ plans of duration of stay in London were closely linked with the needs and preferences of their children. Danuta, Janina and Maria planned to go back when their help is no longer acutely needed or when they had to attend to responsibilities in Poland. Only Stanisław was preparing himself for a long-term stay as most of his close family members were in London.

Participants retained strong links with the Polish welfare state. Some postponed their arrival to the UK until gaining pensioner’s rights in Poland. One can argue that the fact that pensions are portable entitlements made such mobility possible in the first place as otherwise participants would not have been prepared to risk the entitlements towards which they worked all their lives in Poland. However rather than transferring their livelihood and entitlements to London, these participants normally retained properties

and bank accounts in Poland where they drew their pension from. The value of the Polish pension was small compared with cost of living in London, thus during the stay in London some relied on their working children for financial support. For instance, Stanislaw mentioned receiving “*pocket money [kieszonkowe]*” regularly for shopping and personal needs.

Polish pensioners were also the exception among respondents in that they retained access to public healthcare in Poland on the basis of obligatory health insurance contributions deducted from their pension. Participants facing a language barrier and some negative opinions of the NHS, were rather keen to use this right. For example Janina and Maria were not registered with a GP. Maria after experiencing an acute medical episode declined an offer to have an operation in the NHS made by the A&E doctors:

“The doctor proposed that if I want they could operate on me. But I said thank you very much but I do not live here permanently. I will go to Poland and I will sort this matter there (...) And shortly I went to Poland (...) and I had my operation in Poland.” (Maria)

The engagement with the British welfare system remained sporadic and characterised those who planned a long-term stay. For instance Stanisław was in regular contact with his GP and he took advantage of discounts for senior citizens such as the Freedom Pass for London transport.

To all informal carers the lack of English was a “*barrier number one*” (Maria) in everyday life in London. In this respect the participants were completely dependent on their family members. The inability to communicate was also a source of personal embarrassment for Danuta who treated it as a matter of wounded ambition. Stanisław was attending a language course and making some progress although noted that “*learning comes difficult at my age*”.

Despite not being able to follow the news on TV or in the newspapers, some participants forged many weak ties with English speaking persons in their local neighbourhoods. Thus confinement to the private sphere and a language barrier do not prevent the establishment of some local ties and attachment to the local area. This is because everyday encounters during shopping, attending playgroups, parks, playgrounds or local buses all present themselves with opportunities for interactions with other residents. Stanisław, perhaps due to his extrovert personality, perceived his neighbours of different races and nationalities as “*friendly*” and joked about utilising

whatever means possible, for instance German or non-verbal communication, during his encounters with other parents and grandparents in the local playground:

“He was from Africa, but I do not remember what country... we’ve managed to communicate [dogadaliśmy się] using sign language [na migi] ((laughter)). He asked me whether I am a grandfather or a father, I say ‘grandfather’ (...) I say ‘Is it hot out there?’ ‘Oh yes, and it’s cold here’, he shivers.” (Stanisław)

Thus the role of the informal carer, often performed by women migrants, does not preclude and in some instances even facilitates taking on a public role of a local citizen (Hondagneu-Sotelo 1994). Such interactions bridge the non-engagement logic of care with the engagement logic of local membership which is discussed later.

Indeterminate logic

Both self-perceptions of a market player and of an informal carer were often accompanied by a heightened state of indeterminacy of migration and indecision as to further duration of stay in Britain. Feelings of uncertainty as to the future, of not being fully in control and of *“not knowing yet, what we want”* (Renata) generally did not encourage engagement with the formal British welfare state. A state of drifting, short-term orientation, ambivalence and open-endedness of the future plans resulted in a lack of social anchors in British society. The self-perception accompanying such feelings were not that of a citizen, but of *“a newcomer, a tourist (...) a resident for a moment [na chwile]”* (Ola).

The openness of migration plans seems to be a distinctive feature of the latest Polish migration wave. Other scholars termed such disposition an *“intentional unpredictability”* characterising the type of migrants who were described as *“searchers”* (Eade, et al. 2006: 11). Scholars found that it characterised people occupying different socioeconomic positions from low-skilled, low paid occupations to the upper end of the labour market. This was interpreted as a way of adapting to *“a flexible, deregulated and increasingly transnational, post-modern capitalist labour market”* (Eade, et al. 2006: 11). This study largely concurs with the latter findings, yet adds that such indeterminacy is consequential for, and is reinforced by, the lack of take-up of social rights.

22 participants treated their plans of stay as open-ended. The participants following the indeterminate logic contemplated a wide range of options and none in particular for their further duration of stay in Britain:

“Several years, or till the rest of my life. (...) 5 years, or in order to earn a living [dorobić się]. And if I like here, to stay for good.” (Leszek)

“I don’t know, I don’t deny, maybe I will be here 10 years, maybe 20, and maybe, as they say, tomorrow...” (Franek)

“I don’t know how long. I would say that one more year. And in a year’s time I will say that one more. One does not know how life will unfold. I have no idea.” (Marta)

“I haven’t even thought about the return and I haven’t thought about staying. So I think that this is such... I am, because I am, and that’s all. Carpe diem, let’s say.” (Anna)

At the time of interview, many participants were at the peak of uncertainty about what to do next. As they were not sure whether to stay, to return, or to go somewhere else, they kept their engagement with the British bureaucracy to a minimum, just in case they had to make a quick return.¹²⁰ Waław, when asked whether he knew about the availability of benefits, replied:

“I’ve heard. The girl who does my accounts, told me that I was entitled to some housing allowance, something like that. I say, ‘Fuck it’. I say, ‘Do I know how long will I be here for?’ Maybe one more month, maybe two, and I’ll go to Poland... One does not know.” (Waław)

Darek regretted having submitted an application for Housing Benefit as he was worried that he might have to make a quick return to Poland due to the farming business that Darek was overseeing in Poland. Thus the reluctance to engage with the formal welfare bureaucracy could be linked to a desire to preserve the ability of a quick adjustment to yet unknown future circumstances, including a hasty decision to leave Britain.

An indeterminist outlook often characterised participants who were faced with the fact that their short-term plan of migration got prolonged and as a result they had to figure out a new rationale for their stay in Britain. For instance, Renata and Sebastian, a young couple, already prolonged their stay beyond the initial plans but still were not sure as to further duration of stay describing themselves as being *“at the crossroads [na rozstaju]”* (Sebastian). In their case the indecision was exacerbated by the falling value of the pound in relation to the zloty, which was wiping out their savings. One can note that their indecision discouraged them from investing in vital skills such as learning the English language. At the time of re-contact Sebastian and Renata remained in London and were getting more inclined towards long-term stay, thinking about buying property and making use of their entitlement to Working Tax Credit.

¹²⁰ Overall, only one participant who was undecided about further length of stay in Britain claimed any welfare benefits. However there was no similar relationship with regard to engagement with the NHS. In the latter case the actual duration of stay seemed to have a bigger impact in that the longer one stayed in London, the more likely one was in contact with the healthcare providers.

One can argue that the logic of indeterminacy is also linked with a tendency to perceive life events as due to chance rather than of individual making. The impossibility of predicting and controlling future circumstances paralyses long-term thinking and makes planning pointless:

“I don't like to plan because it really does not work out for me. I used to say that I would never go to London and here I am. So I don't like planning because I know that this will not come true anyway, one always ends up somewhere else [than planned].” (Marta)

The impossibility of controlling the future explains why participants' plans, regardless of whether specified or not, are prone to change. The re-contact stage carried out in spring 2009 exposed the lack of stability in participants' declarations of duration of their stay (see Appendix 9, Table 27). For instance at the time of interview Leszek was undecided about his stay in London, but in 2009 he returned to Poland. In 2009 Marta went to Poland to provide informal care but planned to come back to London. Tomek and Monika arrived with specified plans of a long-term stay in London but at the re-contact stage shifted towards indecision and began to contemplate a return to Poland. So effectively any action taken on specified preferences as to the duration of further stay, is not only a matter of calculated choice but partly also a gamble. Participants following the indeterminate logic refuse to take this gamble.

Yet in the long-run the refusal to decide may prove more costly than taking the plunge one way or another. As Zbigniew noted *“Everyone who is here, should become aware whether he wants to live here, and for how long”*. The answers to these two questions would determine whether engagement or non-engagement is the most optimal strategy bearing in mind that both have costs and benefits. In Zbigniew's view it is better for those who decide to live in the UK to go down the engagement path, *“to identify somehow with this country by paying national and local taxes, having no debts or criminal record”*. The indeterminacy tends to be an interim stage characterising relatively recent newcomers (see Appendix 6, Table 11) as it becomes too costly in the long run. The costs of indeterminacy fluctuate at different lifecourse stages. The indecision may seem rather natural and useful for young people as they weigh their options for the future, but the costs of it increase as one ages and faces the need for a more clear-cut belonging to a welfare community. Yet Janusz, despite residing in London for fifteen years, refused to think about his further duration of stay as 'long-term' or 'permanent'. Instead he planned to review his further plans of staying on a six months' basis as he has done for the last fifteen years.

Analysing the experiences of Brazilian migrants in London Cwerner (2001) describes a self-positioning similar to the logic of indeterminacy encountered during this research. Cwerner's (2001: 27) respondents lived in "liminal times" feeling that "the future is uncertain; the present seems to be leading nowhere; and the past cannot be relied upon as a guide for action". He uses the term to describe not only the state of being in transition between two positions and two social orders, but also a limbo-like place which becomes a permanent fixture of migrants' life and which results in them accepting living conditions which they would not put up with in their countries of origin. Many scholars note that indeterminacy and uncertainty, rather than temporary and exceptional, became permanent and endemic conditions of modernity which profoundly affect the identifications, actions and relationships of individuals (Bauman 2000; Giddens 1991).

5.4 The practices of non-engagement

The ways of thinking associated with the market, care and indeterminate logics do not imply engagement with the British welfare state. The satisfaction of welfare needs is often sought via alternative institutions in the UK or in Poland. By not engaging with the formal welfare bureaucracy, participants gain elasticity, ability to adjust and change their course of action in a very short time if needed. However hyper-mobility and transnational flexibility also exposes them to great, private risks. Thus in some instances an increase of welfare needs may prompt the rethinking of one's position in British society followed by engagement. This section explores the practices of non-engagement and their reflexive reassessment.

Participants who did not want to engage comprised a heterogeneous category. It embraced both those who had formal social rights and those who most likely would not pass the eligibility tests as far as welfare benefits and social housing are concerned. The former described low paid, documented workers or self-employed who were unaware of their potential social entitlements, in particular to Working Tax Credit:

"I think that simply we would not be entitled... well, we aren't married, we do not have children, so why [z.jakiej parafii] would one give us some kind of money? ((laughs)) and for what?" (Sebastian)

The latter category could be subdivided into two groups. The first comprised participants occupying the lower end of occupational positions in the shadow economy, who tended to follow the market logic and due to the language barrier tended to look for

“Polish ways to everything” (Magda) and thus were very ill-informed about the British welfare system. The second group referred to those who had already made a leap into more well-paid positions and did not have dependants, thus making them unlikely to pass means testing criteria.

The alternatives open to participants comprised the utilisation of economic or social capital in London or in Poland. Only a minority of participants, namely pensioners, were able to rely on their Polish social rights to satisfy welfare needs. However, even reliance on social capital often required some expenditure of economic capital for example to cover the costs of travel to Poland or to reciprocate for informal help. The ultimate dependence on economic capital meant that not all participants could afford the alternative ways of satisfying their welfare needs.

Surviving unemployment and incapacity without benefits

Particularly during unemployment, participants faced a difficult financial situation. Those who had savings and skills and who were aware of the negative sides of claiming benefits preferred to put all their energy into job hunting and stayed away from the welfare system. In contrast surviving periods of unemployment between short-term, low paid jobs without the fallback on savings required some extreme urban survival skills, *“the school of life”* (Franek). Employed strategies included a drastic curtailment of expenses on food and housing and borrowing from friends. For instance Franek in times of unemployment resorted to using a free meals service for homeless people, slept rough or in the house which he formerly renovated:

“On the day when I was losing my job, I used to come here (to eat)... I know where to spend the night [przekoczować], where to have a shower (...) I don't work anymore where I live but I can sleep there. I am managing now, an old hand [stary wyjadacz].” (Franek)

Above all participants concentrated all their efforts on finding the next job. The search for work included looking through adverts in Polish newspapers or shops, phoning acquaintances, or going to *stójki*, which were seen by Franek and Patryk as a lifeline in periods of unemployment, as *“the only rescue”* (Franek) providing quick cash for a days work which can be spent on the necessities such as food, travelcard or topping up one's mobile phone with more credit. Thus although Arek, Patryk, Franek and others understood the concerns of local residents about the antisocial behaviour such as street drinking associated with informal labour exchange places, they stressed the usefulness of such places to people like them:

“The police got tough and are chasing us away... The stójka should be moved somewhere else. It’s true, this is an expensive Catholic school, children are going to school, and the pavement is often completely blocked because men are standing. But everyone is just trying to get by. I told the police: so what am I to do? To go and steal? Or to beg? They understand it all, but they follow the orders.” (Franek)

The other way to find informal work involved taking over a position vacated from a person for instance who had moved up the occupational ladder. This normally required a one-off payment to ‘buy’ the vacated position or ongoing deductions from wages if the job was provided by a gangmaster or an undocumented job agency. Going through these informal job searching channels may become habitualised. Franek never tried to look for vacancies in a local jobcentre as he was convinced that Poles had no chance of being offered good, well paid work there. In his opinion having a job did not necessarily mean that one had enough money to live on, as he never earned £400 a week in a single job, a sum that he deemed would be sufficient *“not to stress out”*. The existence of jobs that do not pay meant that some participants doing low skilled jobs had to have two or three jobs at the same time or to do *“moonlighting [fuchy]”* (Zbigniew) in order to earn a living and to save a little.

Another strategy of surviving unemployment was contemplating labour migration to another country. In particular Norway was frequently mentioned by male participants working in the low paid, low skilled sector as a potential destination choice at the time of this fieldwork.

In the case of sudden and temporary incapacity as a result of an accident or injury some participants following the market logic preferred to organise a hasty return to Poland rather than to look for ways to recover in London. This allowed them to minimise the costs of lost earnings and spent savings whilst recuperating in London:

“If something happened to (some) acquaintances, they were going to Poland quickly, they were withdrawing from all of this here quickly, if they didn’t have insurance. (...) (he) had a broken leg, so he went to the hospital here, they put a plaster cast; next day, by bus, home ((laughter)).” (Jarek)

“If I get ill, then onto the plane, and I go to Poland” (Wacław)

Such returns may be temporary, as they are cost limitation and crisis management strategies rather than the outcomes of long-term planning to return.

Sub-renting and squatting – affordable housing?

For some respondents a precarious labour market position went hand in hand with a precarious housing situation. Low wages, lack of savings, and instability of employment contracts made renting on the primary rental market out of reach. The scarcity of information about the social housing sector and of this resource as such made social tenancy an equally unlikely housing option. In light of this, 13 participants sub-rented a room or a space in a room in shared accommodation (see Appendix 6, Table 20).

Although this option was the most affordable, it was also the most precarious.

Sub-renting entails renting the accommodation from an intermediate, ‘managing’ or ‘head’ tenant in shared houses.¹²¹ If landlords wish to keep their subletting practice hidden from the authorities, subtenants are not protected by any contractual agreement. The practice of subletting rooms is based on the same market principles as the practices of informal employment agencies and gangmasters. Some ethnic entrepreneurs, such as Paweł’s landlady, combined both businesses running undocumented jobs agencies and subletting flats to migrant workers:

“She arranges work, for example cleaning of flats, and she gives it to women, she pays £5 to these women and takes £8. (...) I found out that they take a flat from an (estate) agency for example for £800 a month (...) and later this Pole sublets (...) for instance, I counted, where I live there are 7 or 8 of us, they even converted a living room to use one more room, this room where I live, it must have been some walk-in wardrobe [garderoba], and one has to pay £65 (a week), so after counting all this rent which all these people have to pay, it comes to around £2000. £800 and £2000, so £1200 profit, well and ... her friend has 7 such houses here, and she has lived here for about 30 years, well and ... they are churning big money [ładny interes sobie kręcą].” (Paweł)

Renting a room in the capacity of a subtenant is usually characterised by no fixed term contracts, short notice periods, low deposits and upfront payments. This is why it is affordable to migrants whose job security and wages are low and may appeal to those who perceive their stay as short-term and want to save on housing costs. However, because there are no formal tenancy agreements, which specify rent and notice periods and responsibilities of each party, sub-renting often leads to disputes between subtenants and head-tenants / landlords, whereby either party may try to abscond from what they initially agreed on.

¹²¹ Shared accommodation is officially classified as so called ‘Houses in Multiple Occupation’ – “a house or a flat in which two or more households live as their main or only residence and where some of these households share basic facilities, such as a kitchen, toilet or bathroom” (C&LG 2007b: 3). Landlords of certain types of HMO must obtain a licence from their local authorities.

As many sub-tenants face job insecurity and intermittent periods of unemployment they are likely to be immediately thrown out of their rooms once they default on a weekly payment. This is why sub-tenants' rotation in such places is extremely high and this is also why some may look for a more 'secure' housing solution which is not as sensitive to income fluctuations, such as living in a former work site or squatting, whereby a period of unemployment does not result in the instant loss of accommodation:

“Of course, I can earn this £60 a week for a flat, and a hundred for a travelcard, even lying down. Only one has to be sure that this flat, so it does not end up like this, that I will enter this flat, and then I trip over somehow [podwinięcie nogi], and obviously again exit from the flat. (...) This is drastic.”
(Franek)

For the majority of participants in this study sub-renting was an entry level housing tenure upon arrival to London. For instance Irena recalls her first accommodation as “*a typical flat subrented by Poles. Sublet (by Poles) to Poles. So the maximum amount of people in the minimum amount of space.*” The move up to renting independently on the primary rental market required the accumulation of savings in order to put down a deposit and relative stability of employment in order to appear creditworthy to estate agents and landlords. About half of participants managed to achieve this leap, for some facilitated by the receipt of Housing Benefit (see Appendix 6, Table 20). The next move up is considering long-term housing options such as home ownership or secure social tenure.

Those participants who found themselves in a situation of not being able to afford even subrenting had to face the prospects of sleeping rough “*under the clouds, under the stairs with a friend*”, “*in some shed, outside*”, in shelters for homeless people, airport lounges, or squatting. Squatting is a practice of taking over abandoned, unlive in properties in London and was seen as a better option to rough sleeping. Some participants were well informed about the legal aspects of squatting: “*I have a brochure, there is an organisation ASS¹²², they explain everything there*” (Ptryk). The occupation of a property is not illegal per se unlike the usage of utilities without paying. This is why Ptryk and others wanted to pay electricity and gas bills, “*in order to be more legal*” (Ptryk). Squatters are tolerated by the police and can be evicted as a general rule only following a court order, which came as a surprise to one participant:

“I was in shock. This was my first more serious contact with English police. ‘Open!’. I said I won’t open because we live here, if I open you will throw us

¹²² <http://www.squatter.org.uk/> Advisory Service for Squatters.

out. (...) 'Passport.' I gave him a copy, but he 'No, passport.' (...) He checked, 'you are clean here and there (in Poland)'. He gave it back! Through the letter box and 'Cheers mate!' And he started to lecture the owner that he did not have a right to enter. That he has to take it through the court." (Bogdan)

Despite the apparent tolerance of squatters, it remained a precarious housing tenure not least because an eviction was only a matter of time, but also due to being exposed to instances of intimidation, violence or theft from other squatters. Thus Bogdan concluded that *"squattling is nothing pleasant, one doesn't know the day or hour"*. It was done out of necessity rather than as a lifestyle choice.

Self-medication and private doctors

Ensuring a stable income to purchase necessities and secure housing do not exhaust all the welfare needs that migrant workers might experience. Despite being predominantly young and healthy, there is always a time when one needs to consult a doctor.

Furthermore it is known that socioeconomic deprivation is associated with ill health (Marmot and Bell 2010). Thus people who do low paid, physically demanding jobs and live in bad housing are prone to injuries, accidents and diseases.

Many participants such as Zenon, Marzena and Ola relied on self-medication, always storing a collection of basic medicines, herb remedies and even antibiotics brought from Poland *"just in case"* (Ola). Relying on the practices of self-medication was not only linked with the language barrier preventing engagement with the NHS but also often with negative opinions about GPs who according to Ola and others are not inclined to prescribe *"anything apart from paracetamol"*.

Those participants who went through a stage of undocumented employment in London before EU enlargement recalled occasional use of Polish speaking private doctors. Their services were usually prohibitively expensive for someone on low wages, thus were used only in extreme situations when other methods such as self-medication failed:

„I did not have much money for a Polish doctor, one and only time when I had a serious problem with ###, then I went to a Polish doctor, I knew that I won't manage myself this time, there had to be an appropriate antibiotic, for this specific illness, so I went to a female doctor in ###, she helped me, I paid £50 for the professional help." (Marzena)

Such respondents were often unaware that they might be entitled to NHS healthcare. A combination of the language barrier, fear of exposure, lack of information and confusion as to entitlement to the NHS resulted in the lack of take-up of public health service:

“This phantom above the head how will I communicate? And what if they send me back home as what do I do here? What is the basis of my stay here? Why do I work when I shouldn’t?” (Marzena)

“I never even thought about going and registering (with a doctor), I used to think, one thinks, who plans to be here for a short time, or maybe who does not know, or who does not speak English, that one is not allowed certain things, for example, how could I register with a doctor? And they will accept me?” (...) when I recall 12 years ago, I don’t recall anybody who would be registered with a doctor, simply if a person was ill one went to a pharmacy or to a Polish doctor or ... one did not get ill ((laughter))” (Magda)

Even after EU enlargement, the misconception about entitlement to the NHS persisted among undocumented workers. Perhaps some Polish migrants are not familiar with a system of healthcare offering universal cover based on a residence criterion. Hence they automatically assume that they are not entitled to NHS healthcare as undocumented workers who do not pay National Insurance contributions and prefer as Ryszard put it *“to sit quietly”*:

“As I don’t have insurance (number) and so on, I don’t pay taxes. One is linked with another, isn’t it? And when one has insurance then one is already registered, one can go to doctor then, there are some services then. And because I don’t have them, one has to sit quietly.” (Ryszard)

The fear of disclosure and the language barrier has put some respondents experiencing health problems entirely at the mercy of members of their social networks such as employers, partners or flatmates who speak English. Janusz after sustaining an injury on a building site had to ask his reluctant employer for translation assistance in the A&E department. Furthermore the consultation of private doctors in London was not only expensive but occasionally did not deliver the best service. When Zygmunt started to experience serious health problems he was not registered with a GP and was unaware of his entitlement to use the NHS. Instead he was directed to a private practice and was prescribed a course of antibiotics. Only after three visits, each costing £50, Zygmunt was offered to go on a patients’ register with the same doctor as an NHS patient, however his condition worsened in the meantime:

“I asked him on the last ... (visit), I kept saying to this nurse, because Polish women work there, asking him to refer me to a hospital (...) and this acquaintance told me: Zygmunt, go to emergency and tell them how you feel. What can I tell? I took this silly phrasebook for emigrants, what other choice did I have? I told them that I am out of breath, I was showing this to them. I came across a Polish woman, she was with her father (...) I’ve asked her whether she could come in with me and tell them what is wrong with me. And she did. They told me to wait a few minutes, somebody came from the hospital and took me. I

remember this much, they put me in bed and put a drip in. And I don't remember anything else." (Zygmunt)

The most tragic example of the failure of social networks and the inefficiency of private consultations and self-medication practices was the case of Lidia's and Irena's housemate. The person worked illegally and did not speak any English. He got used to relying entirely on ethnic businesses and networks for his livelihood. As Irena described he had an attitude of *"I don't know, I don't move, I don't try to find out, I try to survive"*. In particular he relied on his Polish girlfriend who spoke English and who was an intermediary between him and the outside British world, yet as he got seriously ill *"she did not offer him any help"* (Lidia). The housemates' encouragement to go to a doctor was all in vain:

"We kept telling him that he should get in touch when he was still able to walk and was able to go to see a doctor, to register with a (GP) surgery, that they will certainly provide him with an interpreter. I think that he was simply afraid, he was afraid of using any English, even basic." (Lidia)

Instead he sought advice from a private Polish physiotherapist but his condition, which was never properly diagnosed, worsened. Only after Lidia's intervention did her housemate finally get in contact with NHS professionals. However, tragically, it was too late and the person passed away shortly afterwards.

Transnational healthcare practices

There were no strategies localised in Poland that could help in surviving unemployment and low paid work in London, as after all, the majority of participants left Poland for economic reasons in the first place. One could not count on any help from the Polish welfare state unless this was connected to a decision to return to Poland and register as an unemployed person, paving the way to Polish healthcare and other entitlements. The EU regulations discussed heavily restrict the portability of benefits within the EU hence one could not claim Polish benefits whilst residing in the UK, with the exception of Polish pensions.

Similarly housing needs are, by definition, localised and context specific. Thus having a flat in Poland is not helpful in terms of addressing immediate housing needs in London. Furthermore, although some participants owned a property in Poland many were reluctant to rent it out or sell it. Instead they preferred to keep it occupied by family members or friends or empty as a place to stay during occasional visits. As far as social

tenancy in Poland is concerned it is illegal for social tenants to sublet the whole council property and live somewhere else.¹²³

Thus, effectively, the search for alternatives in Poland is narrowed down to addressing one's health needs. The latter required some investment of money for trips and purchasing private services as only a minority of respondents, namely pensioners, were entitled to use Polish public healthcare. However, the deficiencies of Polish public healthcare forced even those who were entitled to seek private services:

“In order to get an appointment with a (specialist doctor), one has to make an appointment oh oh oh, I don't know maybe two months in advance, so when I come to Poland I won't have two months. In order to get the referral to the ultrasound (scan), to do ultrasound, then again let them know, make an appointment with a doctor to find out the results... so automatically I am forced to do it privately.” (Danuta)

Similarly Maria would rather pay privately and have *“a weight off my shoulders”* than wait for a week for an appointment to see a specialist in a Polish polyclinic. One can argue that during the period of transformation, Poles became accustomed to paying for healthcare and formed an opinion that privately purchased health services are better than public ones. People accepted that even public healthcare is never “free” but always costs (Watson 2006). As Kazik summarised *“in Poland we have a system that everything is being done privately.”*

Also dissatisfaction with a long wait to see an NHS doctor steered some participants towards looking for private solutions in Poland. For instance Maria found that the waiting time for her grandchild to see a specialist in the NHS was unacceptable and opted for a quicker private option in Poland:

“One had to wait half a year. The child would have finished himself off [wykończył] in half a year's time. This was impossible. So his father took him to Poland, we sorted out [złatwiliśmy] the doctor over the phone. All tidy. The child had the procedure.” (Maria)

“If I go here to a GP with something, and I have to wait two weeks, then I'd rather buy a ticket, go to Poland, and I will come back in a week and will be better cured than here.” (Bartek)

¹²³ Subletting social housing properties and going abroad has created some controversy in Poland as it disadvantages people on Polish council housing waiting lists. One case reported in the Polish press concerns a man from Wrocław who has been living in the UK for four years. He was accused of subletting his council flat [*mieszkanie komunalne*] in Wrocław. The local council threatened to cancel his tenancy agreement (Czajkowska 2008).

The mistrust of the NHS forced some respondents to double check diagnoses, medication and tests or to obtain second opinions from Polish doctors. After an initial diagnosis done by the NHS doctors Karolina took her child to Poland:

“I decided because I got scared. There was a somewhat sluggish reaction here. (...) they have done one, two tests, that was all. (...) so we took him for a private treatment to Poland.” (Karolina)

This move, in Karolina’s opinion, prompted a quicker reaction from the NHS doctors who offered in-depth diagnostic tests. Joanna was preparing to go to Poland to have a surgery procedure which was advised by her Polish doctor contrary to her London GP’s advice who maintained that *“everything is fine”*. So those who were dissatisfied with some aspects of British healthcare were using privately paid services of Polish dentists, gynaecologists, ophthalmologists and conducting prophylactic and diagnostic tests in Poland. The payments for such services were mainly ad hoc as opposed to being covered by private health insurance policies. Usually respondents tried to fit in such doctor’s appointments during their scheduled trips to Poland to visit family and friends:

“When we are there for two weeks there is practically no day without a visit to some doctor (...) we pay, all privately.” (Sebastian)

One can note that respondents such as Maria, Joanna, Basia or Danuta who had ‘connections’ in the Polish healthcare system either through their own, their friends’ or family members’ past or present work there, were most keen on private topping-up. Thus one can argue that respondents were relying on the Polish healthcare not because it was so much better than the NHS but because they could afford the private consultations and/or they had ‘connections’ amongst health professionals which ensured that they were treated preferentially:

“I have a lot of connections [znajomości] in Poland, half of my family works in healthcare, to me it was always, visit to a doctor, or a referral for tests, this was never a problem, we never stood in queues, it was rather they waited for us, but only because as I say I have such connections (...) to an ordinary person [szary człowiek], of course, there is no difference (between Polish and British healthcare), it is the same, the same dog’s dinner [dziadostwo].” (Basia)

Relying on private healthcare in Poland requires money for travel and purchasing services. Not all participants were in a position to afford such expenses. For example Zygmunt when enquired whether he would have access to healthcare in Poland replied that *“I would, only with money. Unfortunately”* Another respondent in a similar situation noted:

“In this current health condition, I doubt that I could get any free medical help [in Poland], certainly not. I don’t pay any insurance premiums there. So I could get help of maybe even better class specialists but with big money which I don’t have.” (Alicja)

Thus in practice, participants with serious health needs who lacked money had to rely on options available in the UK. In the case of a major illness some participants, such as Helena, contemplated going back to Poland and registering as unemployed which would enable them to access the public healthcare system. Even those who routinely relied on transnational healthcare practices began to notice that the costs of such trips increased as the era of cheap airfares ground to a halt. Jolanta and Mariola noted that this is an impractical long-term strategy of taking care of one’s physical wellbeing *“I will not constantly think, that oh gosh, something hurts me, then I should go to Poland, will I?”* (Jolanta). Mariola gradually moved the care that she required from Poland to NHS institutions. Overall participants who were in the most desperate financial and housing situation in London and who had some serious health problems could not afford a trip to Poland for private consultation. Thus participants noticed the increasing constraints of time (e.g. time off work) and money preventing transnational healthcare seeking practices.

During visits to Poland a number of participants attempted to use their European Health Insurance Card issued by the British health authorities. However the EHIC scheme covers only emergency treatment and not any planned, non-urgent or non-emergency medical services. Thus the attempts to use this card in order to get access to the public healthcare system in Poland had varied success. Marzena noted that *“they look upon it in various ways in Poland”*. Jolanta managed to visit a doctor in Poland using the EHIC however she noted that *“the doctor was more interested in this card than in me”*. In contrast Zofia was refused a free medical consultation on the basis of EHIC in Poland as she came across a doctor who despite being based in the public health centre had no contract signed with the National Health Fund (NFZ) and thus would not be able to get the costs of seeing such patients reimbursed.

Access to public healthcare in Poland was the privilege of a small minority of participants – namely pensioners. Nevertheless many participants opted to have at least some health services such as dental care purchased privately in Poland. Some respondents also opted for more complex procedures such as surgeries or diagnostic tests to be conducted in Poland especially when they had some connections among

Polish medical staff, the means to pay for it, and if they distrusted the NHS. It is symptomatic that not all participants could afford such privately purchased healthcare.

Evaluating non-engagement

According to the “insider-advantages” approach to migration decision making, the availability of social security in host country increases the costs of remaining undocumented to migrants (Fischer, et al. 1997: 83). Thus one would predict that Polish undocumented migrants will be regularising their status and claiming benefits. However this approach does not take into account an inherent contradiction between the market logic of non-engagement and social citizenship logic of engagement. Furthermore it does not take into account the direct costs of engagement with the welfare state. Some individuals may perceive them as too high to engage.

Legalisation of work does not always bring obvious benefits but it incurs clear costs in the form of taxes. Combined with a lack of understanding of the top-up benefits such as tax credits, the regularisation of low paid work did not make much economic sense. For instance Franek regretted having regularised as a self-employed:

“When I see it now, then truly it was unnecessary. Well if the employers do not want to hire me, then it’s only putting me into debt, because I have to pay insurance, I have to pay £200 (...) now there are accounts, one has to pay, because there will be a fine if I won’t do it till the 31st. Here a hundred, there two hundred, where can a man get it all, where from?” (Franek)

Furthermore Franek noted that the legalisation and potential recourse to benefits incurs additional cost of an increased scrutiny by the state of one’s private affairs and setting out the strict control over what one can and cannot do. This was also hinted at by Jarek who noted that many of his acquaintances who were undocumented workers in Britain were able to close off their functioning in London speedily and move on, if they had to, but reflected that his own situation in this respect is “*somewhat worse*”:

“In our case it would have been somewhat worse, wouldn’t it, because we have various contracts signed, we have, we are employed normally, we have insurance, so things are slightly different.” (Jarek)

On the other hand participants were becoming increasingly aware of the costs of non-engagement such as loss of subsidies that make the work pay, loss of protection from risks of illness or unemployment and of a vicious circle of undocumented work.

Following the market logic, and functioning in the secondary labour market, some participants were unaware of the role of the state in remedying market created income

inequalities. One can hypothesise that participants who viewed capitalism as a system in which rewards are proportional to inputs assumed that one can earn a good living simply by working hard. They were unaware or found it difficult to accept that state subsidies and ‘top-ups’ are needed to make hard, manual work pay. Participants who voiced anti-statist, pro-market views may be unwilling to accept that state intervention is necessary to provide capitalism with a human face. For instance Franek had high hopes at the start of finding “*good job, where hours will be paid, overtime, honest taxes*” but was disappointed with long hours and low wages:

“They’ve opened the labour market, but they’ve lost control over it all. Employers do what they want. (...) Business is booming, the economy grows and declines, because you know people lie on the streets, so they have to intervene, they have to treat people, so there are also minuses, but the economy goes forward because of cheap labour. As I say this has become European America.”
(Franek)

Jarek, Zbigniew, Bartek and others reflected on the collective position of Polish migrants in the context of the British labour market. They pondered the possibility that due to Polish migrants’ readiness to accept hard work they may have inadvertently driven downwards the wages in the low paid economy sector. As Franek noted “*maybe we are partly to blame for this, maybe someone else, clearly, when one organises a party, one has to accept that there might be victims ((laughter))*”. Zbigniew argued that in the long run it is not beneficial for Polish workers to accept lower wages and patch it up by taking on as many hours as possible or doing multiple jobs:

“Poles are driving it down (...) this will not change until Poles will understand that one has to respect oneself. That one has to have self-respect [honor] when it comes to work. Because someone else will go to the same job and will get twice as much. And a Pole will go because he wants to go to work. And this is definitely wrong.” (Zbigniew)

Participants noted that undocumented work also has some inbuilt path dependency. Once a person starts to work illegally it becomes difficult to break out of the cycle and out of the habit. This is because such work makes one extremely time-poor, the hours are long and antisocial, the time-off unlikely, and consequently there is no time to sort out necessary documents or to search and apply for documented work. Similarly during periods of unemployment the focus is on trying to get by and on finding the next job as quickly as possible. Moreover as Zenon observed, the experience of undocumented work is conducive to remaining in the shadow economy for fear of having to pay outstanding taxes and charges.

One can argue that the costs of remaining undocumented increase as a person ages. Participants who were in their 40s and 50s tended to see illegal employment as a more risky strategy due to the lack of social protection in anticipation of their greater reliance on services as they get older. Zbigniew noted that illegal employment seems like a good strategy for young people who “*don't save up, who live from day to day*”, yet they will not be able to prove their years of work in order to gain pension entitlements either in Poland or in the UK. Zofia encouraged her husband to obtain all documents and types of insurance when she was still residing in Poland:

“When he was phoning me, I used to always shout, because you know, a person of his age, one is simply too old to afford this kind of... I will work without insurance, without other things...” (Zofia)

Overall, although undocumented work makes short-term economic sense, bringing immediate cash, it fails as a long-term strategy. In particular it fails in the event of a crisis. For instance Zygmunt, who was a victim of an unscrupulous employer in the past, was keen to find documented work in order to gain some protection from such an employer during a likely future admittance to hospital:

“If the contract is signed this already covers me. But if I don't have a signed contract, if I work illegally [robił na czarno] then if it catches me during work I will have to pack my bags [majdan] and dash [walić] to hospital. I may not be working next day or see money.” (Zygmunt)

Unfortunately at the time of re-contact Zygmunt's situation had not improved. After a short spell of undocumented work he became unemployed. He also observed that the wages in the shadow London economy had dropped as a result of the economic crisis well below the levels seen during the economic boom of the 2000s.

Thus from an individual perspective one notes a certain ‘security / mobility’ trade-off. Non-engagement enables a greater flexibility and indeterminacy, whilst taking away the security and safety. Kazik, who used to be an undocumented worker, explains this trade-off in the following way:

“This tax, which the boss pays for us now, we used to get it in hand. I was planning to return to Poland, so there was no point, you know, to get involved with bureaucracy here [pchać się w biurokrację] ; (...) I used to earn a lot more, but I could not apply for benefits. (...) To open a (bank) account, insurance number, I knew about all of this, but later one has to close it all... and it requires time. And when one works, money travels from hand to hand, without any taxes, charges, anything... ‘Sayonara! On Saturday I go to Poland and we part and I pack one suitcase.’ (Kazik)

However after a period of illegal employment, during which Kazik earned and saved money with a view of return, he decided to regularise. This coincided with, or perhaps was induced by, the arrival of his wife and child to the UK.¹²⁴ The regularisation happened because, as Kazik explains, families rely on public education, healthcare and welfare to a greater extent:

“It was about the child. As we would have managed, but occasionally he needs immediate (medical) help, also he needs education, so everything was pieced together with him in mind. And you know, at the time when the wife with the child arrives here, it’s obvious that one has to create normal conditions for the family.” (Kazik)

The four issues – the reappraisal of expected duration of migration, reunification of family members, regularisation of employment, and engagement with the host welfare state’s institutions – were reported often as happening simultaneously in the lives of participants. Thus one can conclude that the regularisation of employment is important to those participants who anticipate greater reliance on services and benefits, either because of the presence of their family members or because of their own needs of support for instance as a result of long-term health problems. So some participants reassessed their situation opting for greater security and shifted from a pure migrant worker’s to a social citizen’s way of thinking.

Yet one can note that although regularisation is a necessary condition of engagement with the host welfare state, it is not a sufficient condition. Not all participants who regularised their employment have claimed benefits. Furthermore some participants regularised their employment not in anticipation of a recourse to the welfare state but because of a fear of deportation (before May 2004) or due to pragmatic tax advantages. Thus one can argue that engagement also requires a change in normative outlook, a switch to a self-perception as a social citizen in British society, an endorsement of the interlinked logics of needs, desert and membership, which will be looked at next.

5.5 The logics of engagement with the British welfare state

Normative logics of engagement with the British welfare system may be partly an outcome of deeply held views on distributive justice and partly formed as a result of learning from interactions with British service providers. The latter aspect implies that they may to some extent reflect the self-interests of participants and could be seen as a

¹²⁴ The family decided to reunite in London as it was too expensive to maintain two households.

product of discursive and interactional adjustments aiming to work out and preserve the integrity of one's social identity and physical wellbeing in a new social setting.

Although in part representing reflexive capacities of individuals, these logics in turn serve as discourses legitimating participants' access to British public goods, so in that sense they are not only an outcome of engagement, but also consequential for it. Thus it is worth outlining them first before considering the processes of interactions during which such logics crystallised.

Needs logic

The needs-based logic refers to the fundamental frailty and uncertainty of the human condition. Experiencing a sudden, profound and urgent need such as a need for shelter, medical attention or lacking basic necessities such as food may endanger human existence. Thus needs serve as triggers, prompting people to seek various ways of satisfying them.

However, engagement with the formal welfare system solely on the basis of experiencing needs was deemed contentious by many participants. When participants were asked whether Polish migrants who found themselves homeless and jobless in Britain ought to have access to British welfare benefits and social housing, this was generally perceived as inappropriate. Firstly, participants noted that beyond the basic, physiological needs necessary for human survival defining a need is problematic. As Jolanta stated *"needs can be understood differently... one person may need only food, and another person may need luxuries"*. Participants noted that as needs are highly subjective, its definition should not be down to an individual. Instead some collective consensus on what can be perceived by others as a legitimate need in a particular society should be sought and individual cases judged against such standards.

Secondly, participants felt that granting access to public goods on the basis of needs depreciates the social value of contributions into the common good, made through paid work and payment of taxes. For instance, Leszek remarked that giving Polish migrants who are homeless and jobless an unconditional financial help in the form of benefits would depreciate the value of his own work:

"It would be a ridiculous situation if everybody lie down on the street and get money for this, then I would regard my own work as nonsense [bezsens]. I work and get as much as him, this would be truly ridiculous, pathetic. In such case I would have laid down on the street too." (Leszek)

The view of conditionality of welfare resulted in perceiving certain categories of people in need as legitimately excluded from access to social welfare. Specifically, there was a considerable agreement on excluding people who were widely perceived as able to take on paid work but who did not want to take it, for instance Polish homeless migrants. For example Wanda stated *“I do not see the need to support people who do not want to work.”*

Thirdly, the narratives suggest that the solidarity eroding impact of unconditional needs-based claims was not mitigated by a sense of shared national identity. The perceived lack of contribution through work (along with the perceived abundance of jobs at the time of fieldwork) justified the exclusion of needy Polish migrants from access to welfare despite any national solidarity bonds that may have suggested otherwise:

“One could (...) be a true Pole and say, well, yes, persons who come here and sleep on the streets, they should receive benefits. But in my opinion they should not, because the whole Poland would have come here, laid on the street, got the money and rented the flats for themselves, wouldn't they?” (Leszek)

The contentious nature of needs resulted in split opinions as to which welfare community is responsible for Polish migrants in need. Michał, Kazik, and Sebastian were among those convinced that Polish homeless migrants are largely *“Poland's problem”* (Michał) as the blame lies solely with such persons and the solution would be *“to send (them) back to Poland, these are your citizens and so deal with them”* (Kazik). They maintained that if the English authorities were left to deal with the situation, it would *“reflect badly on Poland”*. Joanna was also convinced *“why should the English help them? They haven't worked here, they've done nothing for this country, and these are Poland's citizens.”* On the other hand Marcin argued that such people manifest their needs in London and so Poland is not responsible: *“Poland? No. Why? It is not their problem, they do not lie on their street.”* Bartek argued that by inviting all migrants in, without any selection process, Britain automatically took responsibility for providing a safety net for them when things go wrong. Thus the split opinions among participants highlighted the fact that migrants in need can easily fall between the cracks of host and home welfare communities, neither of which wants to take full responsibility for them, and so they are mostly *“left to their own devices”* (Ola).

On the other hand the general opposition to the needs-based logic was tempered by the widespread conviction that one ought to, at some point, take into consideration the gravity of experienced needs when deciding on appropriate redistribution criteria. Even

Leszek, who disapproved of helping non-contributing Polish homeless migrants, was prepared to grant financial help if a person would otherwise die from hunger. One can argue that the intersubjective agreement necessary for legitimating needs-based claims is reached more easily when one talks about extreme situations which expose the general frailty of all human beings. Thus when it comes to accessing medical help, needs were seen as a sufficient basis for using health services, unlike the cases of access to financial help and social housing.

A small number of participants pointed out the need to show more compassion and appreciation of the social, as opposed to individual, factors beyond the desperate situations that some Polish migrants found themselves in. Ola remarked that *“system is system but people are people”* and it is difficult to make clear-cut judgements when one looks at individual cases. In particular Ola and Jarek pointed out that some migrants have no other choice but to do undocumented work. However if they stop undocumented work due to illness, accident or unemployment, they experience a dramatic fall in living standards, including being endangered with homelessness. One only needs to stumble twice:

“Work is finished, they throw you out from the flat because you don’t have money and such a person ends up shortly on the street.” (Jarek)

Janusz and Helena remarked that the responsibility to help such workers should rest partly with employers as they directly benefit from the undocumented workers, but often fail to help their employees when they are in need:

“During this time when one is not registered, the employer who one works for should help (...) because you know one works for him and he does not pay any taxes for the worker, I mean he pockets it and afterwards if any accident or something then... he washes his hands of it and ... ‘do what you want.’”
(Helena)

The lack of concern for the welfare of undocumented workers and overall high conditionality of access to public welfare in England was described by Alicja, herself grappling with a difficult housing situation, as *“odd, inhumane, not humanitarian”* especially when contrasted with the image of England as a *“rich state”*.

As a result, a minority of respondents considered that although some individual cases fail on the contributory principle, they should not be denied help on humanitarian grounds. A number of participants supported the work of charities which help such people and take care of them. Kazik maintained that one *“should not punish somebody*

for being inept in life [niezaradny życiowo]”. Bartek stated that help should be available “because not everyone who is here on the streets was some kind of a bad person, an alcoholic or God knows whom”. Krystyna noted that despite a natural inclination towards redistributing according to what people deserve or what they put in, one cannot turn a blind eye to the fact that “people have different skills and that there are people who need more help in life”.¹²⁵

All in all, respondents rejected claims against the host welfare system based on needs decoupled from a duty to contribute without a socially valid reason. Receiving British welfare without contributing to British society, chiefly by working and obeying the law, was condemned by the majority of respondents. On the other hand some participants were also aware of the potential difficulties of applying a strict contribution principle. People may have extensive care responsibilities or disability, the needs they experience may be very grave and/or their desperate situation may be a result of the circumstances largely beyond their individual control. All these circumstances make allowance for the principle of needs on humanitarian and compassionate grounds.

Desert logic

By far the strongest argument legitimating Polish migrants access to British social rights was emplaced in the desert-based logic. It resonated with contractarian versions of citizenship outlined by Thomas (2002) and discussed in Chapter 2. In participants’ view Polish migrants’ contributions to the public good of British society by working, paying taxes and obeying laws paved the way for the unequivocal belonging to the British welfare community and gave the right to use its public resources. In the interviews, participants emphatically stressed that collective and individual contributions of Polish migrants to British society earned them British social rights. For instance, Natalia saw British social entitlements as a kind of “pay off [zapłata]” for residing here, working legally and paying taxes.

The overwhelming majority of respondents supported having the option of exercising social rights in Britain open to Polish migrants who work, pay taxes and function within the legal framework of this country.¹²⁶ So long as these conditions are fulfilled

¹²⁵ Although the issue of entitlements of people with disabilities was not discussed directly one can argue that according to this line of thinking they would be socially exempt from the duty to contribute. As Piotr noted “fair does not always mean equal”.

¹²⁶ In this subsection social rights comprise benefits and housing entitlements. As far as healthcare is concerned, respondents tended to apply more unconditional criteria of access based on needs. The distinct

respondents argued that Polish migrants should have access to the British welfare system on equal terms with other law abiding citizens of the UK. Notably this opinion was shared by participants of diverse social standing.¹²⁷ Fulfilling a number of social citizen's duties was seen as keeping the Polish side of the bargain in a contractual agreement between a Polish migrant and Britain ensuring that both sides are fair towards each other:

"If I expect to be treated equally then also I ought to do everything in that direction in order to be such full-fledged member of the society." (Emilia)

Polish migrants' collective contribution to the British economy and society at present, and to a lesser extent past and future contributions, were seen as justifying the recourse to social rights in Britain. First and foremost participants stressed the contribution made by working and paying taxes. Marta summarised this view:

"Poles are such a nation that they come here to work. We are paying taxes, very big taxes. The income into the state budget from Poles is certainly very high. At least I think so. Very big. So in my opinion, we have the utmost right to this. So to speak we are enriching their budget." (Marta)

Bartek remarked that the majority of his acquaintances work and pay taxes but do not take any benefits or rely on public services. Thus the majority of Polish migrants collectively subsidise the minority's recourse to social rights in Britain. As Bartek put it *"even if one Pole gets something, another Pole pays taxes for it anyway."*

Polish migrants' contribution to the British economy did not stop at providing a tax base and labour when Britain needed it the most, but also on *"on driving the boom stage"* (Emilia) of the economic cycle by participating in the British market as consumers of goods and services. Marzena made this point by stating that Poles *"do not take and run, but we live here like everybody else"*.¹²⁸ The role of a consumer entitled her to a stake in the public goods of the host society:

"I do pay here for my flat, I pay here for travelcards, I live here, I buy food here, I buy clothes here, I spend my money here, the amount I send to Poland is

normative attitudes towards redistribution of healthcare have been noted also in other studies of perceptions of social justice (compare Dwyer 2000: 130; Marshall, et al. 1999: 358).

¹²⁷ It has been noted that individual class attributes such as education or income do not differentiate attitudes towards welfare in a straightforward way. Often studies find no correlation between class and attitudes to welfare (van Oorschot 1999; 2006) or find that such differences are "driven by group interests and solidarity rather than by individual-level differences in interests and values" (Kumlin 2007: 369).

¹²⁸ Contrary to the view of remittances as an almost definitional criterion of labour migrants (Stark and Bloom 1985; Massey 1990), participants of this study remitted moderately, did not save excessively, and spent most of their income in the UK. Perhaps this was due to the fact that many participants had already relocated their families to Britain.

a drop in the ocean of my wages and my income, so I do not feel here the way they write about me, the English, those, those tabloids, how they write about us, I do not feel here the scrounger [darmozjad] because I'm here... functioning legally. If anything, I am exactly the same scrounger as an Englishman on benefits.” (Marzena)

Migrants' economic contribution was at the heart of one type of claim to membership in British society. Respondents argued that Polish migrants have a right to be sheltered from the negative externalities of the flexible market – such as low paid and temporary jobs – just as much as any other members of British society. The juxtaposition of low paid jobs and the “*horrendous*” (Mateusz) costs of living in London legitimised their recourse to welfare benefits. This seemingly quintessentially Marshallian logic was applied by Mateusz, Anna, Ola, Jolanta and others:

“In my opinion if one earns an insufficient amount, if one works honestly, normally, and earns insufficient amount in order to live on a decent level, then if government is able to help and if it helps, then one can have recourse to benefits.” (Jolanta)

Yet one can argue that respondents did not see this social democratic fix to the market economy as one of the fundamental state's duties towards its citizens, as arguably T.H. Marshall did and as British general public still does in some respects (Dwyer 2000: 192). Participants tended to qualify their accounts by saying that such help is welcome “*if state is able to help*” (Leszek). They did not voice excessive, unconditional welfare claims against the British state. One can argue that instead of perceiving the right to welfare as part of a universal package of citizens' rights, participants viewed it as something that should be earned and was contingent both on certain qualities of an individual and that of the respective host state. This signals one of the crucial divergences from the Marshallian social citizenship paradigm.

The belief in conditionality of welfare was accompanied by the view of welfare as remedial and temporary as opposed to ongoing and long-term. It was widely believed that even if one's contribution record is spotless, the recourse to public welfare should be temporary and made only when in a “*tight corner [w podbramkowej sytuacji]*” (Michał). Many interviewees condemned the “*milk the cow*” approach (Michał) and attempts to “*draw from the system as much as possible*” (Ewa). Several participants agreed that benefits should be available only as an initial helping hand in order for people to help themselves, rather than as a permanent option on which people become dependent as time goes on. As Jolanta remarked currently “*one gives, you know, a fish not a rod. And the idea is to give a person a rod.*” Such participants noted that “*apart*

from giving, a state has a duty to motivate these people” (Krystyna) and that “help to become independent is what these people need the most. This is what will prove fruitful in the future” (Karolina).

The temporariness of welfare was advocated both by claimants and non-claimants but for different reasons. Sabina, a single mother who tried to arrange some formal support, maintained that due to the scarcity of public resources claiming benefits for too long or indefinitely results in encroaching on other people’s social rights:

“The number of people waiting in a difficult situation rises all the time, so one can help for let’s say three years. And the rest, you know, others want it too. They want it too, so one should not pull it all the time.” (Sabina)

In contrast the non-claimants maintained that the long-term payment of welfare benefits had a demoralising effect on individuals, provided disincentives to work, bred dependency and helplessness, and destroyed entrepreneurial spirit. Thus although there was overwhelming support for Poles having equal rights of access to social welfare in Britain many participants noted that they would rather Poles did not make use of these rights too often in order to maintain morale, the centrality of the work principle and a positive image of Polish migrants in the UK.

The desert-based rule of redistribution of resources, in which equal input deserves equal rewards regardless of person’s citizenship, nationality or ethnicity, was considered as only fair. Franek put an almost biblical twist to it:

“If a man comes, does not interfere in the country, pays tax, is not a citizen or even is not a resident but does everything the same way as every English citizen, then why shouldn’t he be entitled? If one went to work and worked one day for a host [gospodarz], then why should it be an exception that one person will get something to eat and another won’t?” (Franek)

The attachment to the conditionality of welfare meant that participants tended to accept a degree of outcome inequality as long as principles of equality of opportunities were endorsed. A certain level of inequality was seen as inevitable as Danuta remarked: *“never was it the case that everybody could afford everything”*. Franek noted that migrating to another country is not without risks and in his by now familiar allegorical style remarked that *“not everybody will come out of the woods with baskets full of mushrooms.”*

Work ethic

In participants' narratives contributions by virtue of work took a central stage in the desert-based logic of engagement with the British welfare system, paving the way for an acute sense of earned British social entitlements. Work was also perceived as the ultimate way to advance up the social ladder. Many participants such as Jolanta were entirely focused on education, self-development and on looking for better opportunities on the labour market rather than for "*any benefits or some dole [socjale]*" as a way to achieve the desired living standards. Even working below qualifications was seen by some as a more valued option, often a springboard to a better job, than drawing benefits and being idle. For example Leszek who worked as a shelf stacker in one of the big supermarkets felt that "*it is not stunning work but I do something, I can say that I am not passive. And this is already a lot.*" Encouraged by positive feedback from British employers participants maintained that "*Poles simply respect work*" (Karol). Thus work was seen by many as an activity which has not only monetary but also moral value.

Inevitably such high esteem for work and subscription to a strong work ethic impacted on participants' views of an appropriate criteria for redistribution. Maria maintained that people who contribute through work should be given priority in accessing limited public resources such as housing:

"First and foremost in my modest opinion (...) help should be available when somebody works. One ought to help him if there is a need. As one works, one does something." (Maria)

As it was noted before, unconditional welfare aimed to uphold needs-based claims was seen as contentious because it depreciates the monetary and moral value of work. Mateusz observed that as we all have "*somewhere deep in our mind a kind of layabout*" there should be a clear incentive to actually go to work. In the opinion of Waclaw and others the availability of welfare takes such an incentive away. In particular, in the situation of an abundance of jobs at the time of economic boom giving in to one's 'inner layabout' was seen as piggybacking on hard working members of society:

"I work hard, pay taxes, whilst someone for instance does not work and takes various benefits. Why? There is work. If we can find work then an Englishman also can find work for himself, can't he? Or a Pole, when he comes." (Natalia)

Not working was perceived by some as morally corrupting in the long run. People who avoided work were described as "*lazy*", "*lacking ambition*", "*a parasite*", "*of lesser worth*". There was an intrinsic presumption that it is morally dubious to get something

without working hard for it. As Maria noted in such a case one may lose an appreciation of the value of things in life, displaying an attitude of *“easy come and easy goes”*.

Obeying the law: *“Dura lex, sed lex”*

Apart from seeing work as the prime legitimating pathway to British social rights, participants also stressed a duty to obey the law of the host country in the spirit of full compliance. A conviction that one should accept, rather than criticise, judge or bypass British laws made some participants reluctant to voice comments and assessments of existing policies governing access to welfare benefits or social housing. The statements such as *“these are their laws”*, *“they simply have it like this”*, *“this is a completely different country”*, *“we are guests here”* suggest that British rules should be shown respect and taken for granted:

“Every country introduces some rules and when one comes here one must accept them.” (Agata)

“Being in a foreign country one has to somehow adapt to all these rules, regulations, duties and any laws which are here” (Bartek)

In particular, respondents emphasised the importance of paying taxes and adhering to the rules which protect the welfare system from abuse. Thus Karol and others pointed out that those who exploit and abuse the system should be denied access to it. A number of participants such as Karolina, Beata and Bartek questioned the eligibility of undocumented workers operating in the black economy to welfare assistance. This was due to them showing a lack of *“loyalty”* (Karolina) to the system and free riding on its loyal members:

“When for example I do not want to pay taxes because I keep working illegally or something like that, in the black economy, then automatically regardless whether I live in England or Poland or somewhere else it would be difficult for me to say that someone like this has a right to public services.” (Karolina)

Although in the paradigm where work plays a central role, to which the overwhelming majority of participants subscribed, undocumented work can in principle be viewed as a productive activity, yet it falls short of the credentials of the second condition of adhering to the rule of law. Thus many participants noted that, unlike in the case of documented workers, the British welfare system has no responsibility to help Polish migrants who worked illegally in Britain should they experience an accident which prevents them from working. Bartek noted that only those persons who made some effort as he put it to *“activate”* themselves in Britain should be allowed access to the public goods that such a system offers:

“Those who are (here) illegally, well sorry but it is their fault that they did not attempt this or that, some kind of activation [zaktywowanie] in this country, at least the basic one, I mean, insurance or the CIS card.” (Bartek)

One of the ways to “activate” oneself in the UK, applicable to non-exempt workers, was an obligatory registration with the WRS scheme. Paying a fee and sending out the application was seen as complying with the desert-based logic of engagement requiring obeying the law. Some participants such as Jolanta, Ewa or Emilia had a genuine plan and desire to be ‘legal’ from the first day of their employment in London. They were motivated by the belief in the imperative of obeying the law, which was seen as bringing the long-term personal benefits of security and protection. However because of some employers’ reluctance, regularisation of employment often required a change of job. This was the experience of Sabina, amongst others, who worked as a cleaner in a London hotel and wanted to register this job with the WRS in order to increase social protection for her and her child:

“Mainly all were employed illegally. They had only a few persons, who were legal, the fallbacks [podkładki], and the rest, if there was an inspection, then home. I mean, they were told to go home and to return shortly. So I went to speak to them, that I would like (to work) legally, papers, all that. Because I have a child, because I came here to work legally. I do not care about the illegal work. And him... ‘well, no, no, no, we will see later, some more time.’ I say, ‘How much more? It’s been already half a year’”. (Sabina)

Sylwia and Jolanta had similar experiences with their first employers in London before moving on to registered employment contracts respectively in the finance department of an IT company and as a restaurant manageress. Initially Sylwia worked as a housekeeper and she described her employer’s attitude in the following way:

“One needed a letter from your employer... they... there was no chance to get it. ‘If you want a job, have a job, and we are not interested in anything else. You have to come at this time and that’s all.’” (Sylwia)

Jolanta and her boyfriend worked as live-in 24-hour carers in London. Her repeated requests to initiate the process of registration with the WRS were left unanswered. Due to not being able to secure the cooperation of their employers they both resigned:

“I was very embittered because of that work, because we lost nearly four months of legal work and entitlements. (...) It was very important to me. (...) As I said I did not come here to work illegally and to take money out of here ... I don’t know, in the suitcases. I want to live and work normally like any normal person, to pay taxes, to be insured and so on. This is after all my own security and I knew how important this [registration] is later, when trying to execute one’s rights and so on. I even tried to contact Citizens Advice, to find out whether we can demand [from the employers] a backdated registration. But this turned out

to be impossible. We could complain somewhere, they would have problems [mieliby przechlapane] because of this, but we thought ... no, it's not the point. We leave and the end, let other people worry." (Jolanta)

Emilia was surprised and “*disappointed*” that after EU enlargement the structural mechanisms perpetuating the informal labour market in London did not cease to exist and that many Polish migrants were still doing undocumented jobs and receiving below the minimum wage:

“I thought that we are already in the [European] Union. (...) So everybody is legal, one surely starts from this basic wage. And I was totally disappointed, because one still can be employed illegally or semi-legally (...) It used to annoy me, why he does not want to employ legally, why people don't have even this basic wage. After all this is illegal!” (Emilia)

So for many participants remaining ‘legal’ was very important because of social and psychological reasons, and because of imperative of remaining ‘fair’ towards this country which in turn, in principle, should reciprocate with the same. For example, Ewa could not cope psychologically with the condition of being an “*illegal worker*” during her first migration to Britain before EU enlargement. Only because one could work and reside legally after May 2004 did she decide to come the second time. Irena was warning other people about the downsides of illegality “*out of a sense of duty (...) because one never knows, when will you need some entitlements, like medical.*”

The majority of participants accepted the vesting period of 12 months of continuous employment before a Polish migrant acquires the full rights of an EU citizen as laid out in the WRS as legitimate. Thus participants saw social rights as contingent not only on present contributions, but also on some form of prior contributions, as well as recognising that claims have to be anchored in some, albeit relatively short, time horizon of membership in a new polity. Although many participants were confused as to the exact implications of this requirement and how it influenced their entitlements to welfare benefits, they generally endorsed the premise that the period of work can be legitimately required from newcomers before they acquire social rights in Britain.¹²⁹ This requirement was seen as preventing what Jolanta described a “*pathological situation (...) of coming for benefits*”. Participants maintained that one should observe a sequence of settling in, paying some taxes and only then taking something out of the system. The role reversal with Ukrainians or Russians coming to Poland was brought up to illustrate this point by Irena and Kazik who stated that Poles would “*rebel against*”

¹²⁹ Many participants were wrongly convinced that they are not allowed to apply for welfare benefits whilst accruing their 12 month employment period.

(Irena) and “*would feel bad about*” (Kazik) if such newcomers had access to Polish benefits straight away. Zbigniew noted that once “*I fulfil my duty then I have some rights, I acquire them.*” Thus although one of the few participants who was aware that it was possible to claim benefits within the first 12 months of employment, he regarded this as morally dubious:

“They are here two, three months and they already take benefits. They haven’t yet got their hands dirty working and already they take benefits. If one wants to take something from this state, one has to give first something to this state. One has to identify somehow with this country.” (Zbigniew)

All in all participants felt that social rights have to be earned, “*worked through*” (Wacław, Leszek), or “*acquired [nabyte]*” (Sebastian). To Marcin it also seemed “*logical that one has to work for the right to benefits.*” Together with Ola, Zofia and many others they agreed that there should be some “*limit [granica]*” (Ola), some condition in order to protect the system from asset stripping by mobile individuals jumping from country to country. Thus some participants saw the 12 months work condition as sensible and fair “*safeguard for the British*” (Sylwia) and a “*trial period*” during which as Joanna put it “*they have to check somehow whether one is to them a potential future citizen.*”

In light of an overwhelming support for a vesting period, only a minority expressed some concerns. Patryk noted that it would have been good to get some support for the start of a new life in this country, whilst Alicja brought up the issue of protection of persons who come “*full of good intentions*” but who may become a victim of adverse circumstances and are left without support. Both Patryk and Alicja were themselves in a difficult financial situation.

Furthermore, some noted that the vesting period rule which seems just and logical may unravel when looked at through individual cases. For instance how to treat those who worked just eleven months and whose contribution is thus disregarded on a technicality. Marcin remarked that due to this inherent fault of vesting periods, tending to produce the butterfly effect, it is difficult to formulate fair rules in this respect. His concerns were shared by two other participants. One participant was deported from the US. He was unsuccessful in fighting for a reduction of his suspended sentence from 365 to 364 days, which would have allowed him to stay in the US, where his whole livelihood and family remained. In his own words he experienced that “*one day can change one’s life entirely.*” Similarly another respondent reflected on the case of Iraqi interpreters whose

eligibility to settle in Britain was also predicated on them accruing 12 months of continuous work for British forces in Iraq:

“They took only those who worked for them 12 months. And what about those who worked for them 11 months? After all their fellow countrymen will knife them with blunt blades. So it is not always so fair.” (Bogdan)¹³⁰

However he immediately qualified his view:

“But I do not judge, they have such a system. (...) it cannot be that some scum [żul] comes, works for a couple of days on the building site, receives three payslips, sleeps in the park and goes to the council ‘give me a flat [chata] because I am entitled to.’ It cannot be like this. But on the other hand so inflexible... Well, but ‘dura lex sed lex’” (Bogdan)¹³¹

Civility and self-development

Whilst discussing conditionality of access to British welfare by Polish migrants, participants spoke not only about the importance of tangible, mainly fiscal contributions, but also about the need to follow ideal of exemplary citizenship in everyday life in Britain. This meant living according to a set of principles, which add up to being “*an honest citizen here*” (Renata), “*an exemplary citizen*” (Wanda), or “*a normal citizen*” (Zofia). As Marcin noted, mirroring the views of many participants:

“If one wants to rise in the blessed English social welfare state, one has to earn it. Of course simply by working, but also by the way one behaves.” (Marcin)

The ideal of “*a good citizen*” (Karolina) referred mainly to a person caring about the common good, “*someone who generally cares not only about their own possessions [mienie]*” (Wanda). A good citizen is concerned about the immediate physical and social environment and is “*tolerant, honest, hard working, tidy*” (Wanda), kin to “*contribute, I don’t know, develop, (...) behave appropriately in public (...) not to drop litter*” (Karolina). Notably, in the opinion of the majority of participants a persona of a good citizen was decoupled from the nominal citizenship status and tied to the moral backbone of a person. It was “*rather more like being a better or a worse man*” (Wanda). The latter in turn was seen as heavily dependent on upbringing. Similarly Dawid conflated the qualities of a good citizen with that of a good person and stated that the most basic rule is “*do no harm [nie krzywdzić] to other*”, which is exemplified by the Ten Commandments.

¹³⁰ According to the Times Online “Iraqis employed by the British have to prove “continuous” service for at least 12 months to be eligible to come to Britain.” (Haynes, et al. 2007)

¹³¹ Latin ‘the law (is) harsh, but (it is) the law’.

Moreover being ambitious, striving for self-development and education was part and parcel of being a good citizen as such efforts were seen as benefiting society at large (Joanna, Jolanta) and such a person was seen as a good “*investment*” (Mateusz) for the state he or she lived in. Thus participants with university degrees and a knowledge of English saw learning, improving and using English as the responsibility of Polish migrants. Some were outraged at Polish migrants’ lack of English knowledge and the expectation of being able to get by without English (Michał, Jolanta). Krystyna even suggested that there should be an English language exam upon entry to Britain. The lack of knowledge of English did not fit comfortably with the normative persona of a ‘good citizen’. Those participants who lacked English language skills, apart from seeing it as one of the fundamental barriers in their everyday life, also perceived it as an impediment to engagement with British public life with regard to following political affairs or making informed electoral choices.

Thus apart from work ethic and respect for the law, a high regard for localised public goods, civilised behaviour and a drive to self-development were used by some participants as justification of their families’ access to social rights in Britain because “*we do not put England to shame [nie przynosimy wstydu]*” as Danuta put it.

Among those verbalising the logic of desert were participants who already used social entitlements in the UK and those who did not. One can argue that the latter group was latently engaged with the British welfare state. Participants like Jolanta, Irena, Lidia or Marcin who were young, driven and well-educated stressed that they did not come to London for benefits but on the other hand had no normative objections to using benefits should they become entitled and need them. For instance, Marcin has not experienced breaks in employment so far, but was prepared to “*apply, check whether there is such an opportunity*” if he ever became unemployed. One can argue that these respondents had a high awareness of their earned social rights and were particularly confident in asserting their status in Britain as social citizens.

Problematising desert

Gendered desert

Some categories of Polish migrants may face problems with fulfilling such highly set criteria of desert. For instance women with care responsibilities may find it difficult to contribute through paid work as care duties necessarily restrict the time that they can devote to involvement with the paid labour market. Some of the women interviewed

chose to stay at home to look after their young children, whilst others, especially single mothers, looked for the ways to combine paid work with childcare responsibilities. The latter approach stemmed from the need to maintain eligibility to in-work benefits which were vital part of single parents' household budgets. Arguably this was also connected to the desire to live up to the self-image of a social citizen contributing through paid work. The informal carer's role performed by their older parents enabled participants like Wanda to maintain their involvement with the British paid labour market. However not all single mothers enjoyed a great deal of support from family members. For instance Sabina had to cope on her own and despite stressing her wish and commitment to work was not able to find work which would fit around her childcare duties.

Participants tended to draw clear lines between those groups who were seen as not able to work due to circumstances beyond their control and those who did not work without a good reason. Women's engagement in domestic work and care was seen by Wanda, herself a single mother, as a productive activity ultimately beneficial for a wider society. She postulated that it should serve as a legitimate basis for entitlements to welfare protection:

"It would be difficult to say for example to a woman that you are not entitled because you haven't worked, never worked or haven't worked for so many years. Because as I say she worked her due at home, looking after children. Because as I say this is also work, it is called domestic work but it is also work." (Wanda)

Undeserving 'us'

In contrast, Polish homeless migrants were generally perceived as shying away from work due to individual preferences and as a consequence were seen as undeserving of welfare support. They were stigmatised as those who lacked the desire to find work, led life on the streets "*out of one's own wish*" (Maria, Kazik) and were reluctant to accept help to change their situation. As this was considered unacceptable in the worldview of upholding the centrality of work, such "*young, healthy*" (Ola) persons were encouraged to "*look in the mirror, go home and get to work. Today*" (Maria). Moreover Polish homeless migrants were seen as 'undeserving poor' because of their perceived inadequate individual behaviour and life choices:

"If these people end up on the streets because they abuse alcohol, then 'well, sorry, manage on your own.'" (Marcin)¹³²

¹³² The lack of docility has been noted as lowering the perception of group's deservingness (van Oorschot 1999; 2006).

Although the participants who had experienced being homeless in London themselves offered a much more nuanced and arguably more realistic assessment of the causes and consequences of their homelessness, they too, to some extent, shared the sentiment that a contribution is essential for accruing the right to welfare:

“It cannot be this way that one is a complete layabout and one comes here to trip, drink [ćpać, chlać] and do nothing. Give me benefits and a flat. Well no, that’s stretching it too far [bez przesady].” (Bogdan)

It is notable that participants who had multiple needs and the lowest standard of living also subscribed to a strong work ethic and conditionality of welfare rights on the normative level. For instance participants using homeless centres had concerns about the system of support for the homeless promoting dependency rather than helping to break the cycle of homelessness. The organisational infrastructure in place although helpful in satisfying basic needs was not seen as *“the method to get rid of homelessness (...) here one gets a fish and (is asked to) ‘sail away’”* (Bogdan). In this sense the support offered was seen as almost too all encompassing as it structured and filled in the daily routine entirely without providing incentives to change:

“And so it goes day after day and one does not contribute anything to one’s life (...) it facilitates the simple existence here (...) people are aware that they have nothing but they live.” (Wiktor)

However in many cases such participants were not able to actualise views of strict conditionality of welfare due to various barriers such as low housing standard, multiple health needs, psychological problems, or lack of employment skills. Patryk and others noted that *“life on the streets is partly also a matter of habit, of addiction, because one gets used to it and it suits. And this is also not good”*.

Undeserving ‘others’

The principle of conditionality of social rights has been applied equally in singling out the groups perceived as ‘undeserving us’ such as Polish homeless migrants or Polish undocumented workers, and people of different ethnic backgrounds, the ‘undeserving others’ – such as newcomers from other new EU states, asylum seekers, established Black and Asian ethnic minorities, and native British.

The logic of required prior contribution through work was invoked in critiquing the granting of immediate entitlements to newcomers from the new EU states, in particular Roma families:

“I have heard about Romanians and Bulgarians who come here in big buses and get off with small children and straight away count on help of the British state, well I would simply turn them back where they came from. Because they haven’t put in anything and simply want to prey on the British state. And in some small percentage on me as well. Because I also pay taxes here, insurance and I also have to contribute to something here.” (Karol)

For Maria and other participants accustomed to the migrants’ role as workers, the rationale of migration as seeking asylum was difficult to comprehend, especially if it was decoupled from work. Thus asylum seekers were perceived as *“coming here and only and exclusively making use of benefits. Not working”* (Maria) and as those who do not want to work rather than those who cannot work due to the imposed restrictions:

“A grownup person comes, you know, for asylum and comes and (says): give me for the flat, give me for the food, give me for the clothes. Give me. And what does he do himself? What does he do here in this country? This is shame. This is shame, in my opinion, I would be ashamed. (...) I know for sure that they don’t work, my dear. They get flats and they get them furnished.” (Maria)

Following this line of thinking Maria expressed some frustration that such ‘undeserving’ newcomers get priority over the ‘hard working’ ones when it comes to social housing allocation. Sabina was also convinced that *“they get flats normally, they have no problem”* and voiced concerns about queue jumping and benefit fraud. Maria’s daughter and Sabina were in a process of applying for social housing themselves. In light of these views, one can argue that the formal restrictions that asylum seekers face in terms of access to the British labour market seem particularly ethically dubious as they run counter to popular perception of fairness and attachment to the principle of contribution to the common good.¹³³

The postcolonial migrants who formed established settled communities in Britain were mainly perceived as groups with extensive social rights guaranteed by the monarch¹³⁴ and in that sense in a better position than contemporary EU newcomers. Zygmunt noted that whilst many Poles remain in the dark as far as their social rights are concerned, migrants from the former British colonies had a full set of social benefits guaranteed from the outset of their migration as *“the Queen has brought them, so everything was guaranteed for them from the start. A flat, a job and social conditions. Money, everything.”* Thus respondents were critical of the perceived ‘unconditional’ nature of

¹³³ The disequilibrium between the perceived collective input and rewards of certain groups was at the heart of resentment felt by white working class residents of the East End of London towards Bangladeshi newcomers (Dench, et al. 2006).

¹³⁴ Compare Turner (1990: 207).

postcolonial migrants' entitlements, disregarding or bypassing their contributions or the issue of redress of historical injustices.

In contrast, some participants were keen to stress past collective contributions of Poles, namely the involvement of Polish soldiers in allied forces during WWII. Although not as vast and as complex as the historical baggage of colonialism, there is some legacy of relationships linking Britain and Poland. By the time the post-EU enlargement wave of migrants from Poland arrived there was a relatively close-knit, well established and integrated into British society milieu of older first, middle aged second and in some cases even third generation of British Poles in Great Britain (Chojnacki 2009; Górný and Osipovič 2006; Sword 1996; Sword, et al. 1989). One can argue that the legacy of Anglo-Polish relationships left some points of resentment in the Polish collective memory in particular with regard to the consequences of Yalta conference and the process of resettlement of Polish soldiers in the UK after WWII. In Marcin's view demobilised army personnel were treated unfairly in that they were encouraged to return to communist Poland. Furthermore Marcin argued that their contribution lacked due recognition and many former officers experienced drastic downward mobility in Britain: *"General Maczek was a barman till the end of his days. Very humiliating. The man who helped to take Normandy."* The history of past contributions of Poles was reflected in the personalised family histories. For instance Zbigniew mentioned that his *"grandpa died for England. He fought in the RAF. It was even written in his death certificate – 'the North Sea'".* So according to Andrzej, Zygmunt and Zbigniew, past contributions of Poles during WWII could still serve as legitimating basis for claims to British social rights by Polish newcomers:

"As Poles were fighting, one should be accepted first, all benefits, all that."
(Andrzej)

"I think British owe some duty towards us, don't they? But when one tells some Englishman that someone's fought for him, so they wouldn't destroy his hovels [kibli, listewek i gliny], whom they should be grateful for that, if not us? And General Anders." (Zygmunt)

More nuanced stereotypes were held about native Britons. On the one hand some sections of the host population were condemned as absconding from the conditionality principle and being demoralised by the culture of entitlement which resulted in *"generations, you know, who always lived in council housing, always had everything for free, never did anything"* (Karolina). On the other hand participants acknowledged the ranking of ethnic groups based on the time horizons of collective membership and

length of contribution in which Britons took the top position. Some participants were willing to uphold the greater stake of native British residents to British social citizenship by recognising that their membership of and contribution to this society, sustained over generations, cannot be easily matched by the shorter period of contribution and different terms of membership of newcomers. Kazik stressed that because of this *“we shouldn't compare ourselves hundred percent with the English. Because we are guests here.”* A few participants tried to see the influx of newcomers through British eyes and acknowledged some negative aspects of the newcomers' presence. Ewa admitted that her English work colleague *“is somewhat right”* to feel resentful at the fact that *“her daughter (...) is already 9 years on the waiting list for the council flat. And that she doesn't move on this list at all because, as she says, (they) come from Eastern Europe with the families.”* Notwithstanding such acknowledgement of the position of native residents the majority of participants postulated equal treatment of migrants and natives within the remit of conditionality of welfare, but feared that in case of the 'welfare crunch' non-native residents will lose out first on their welfare protection.

The everyday life in “super-diverse” London (Vertovec 2007) leads not only to the proliferation of stereotypic views, but also offers plenty of encounters which undermine held stereotypes. In that sense life in a multicultural city is cognitively challenging. Thus respondents were aware that ethnicity based generalisations constructed on the basis of individuals who transgress or are perceived to transgress socially accepted norms is unfair and unfounded: *“this depends on the person”* (Patryk), *“one can find a pig in every society”* (Ryszard). A few admitted to facing internal battles trying to resist the temptation to stereotype others: *“I do quarrel with myself in my thoughts with such an attitude”* (Paweł). Participants also knew how it felt to be on the receiving end of negative stereotypes. Three participants were victims of ethnically motivated verbal and physical assaults and many had acquaintances who experienced such intimidation (see also Moszczyński 2007). Thus Bartek voiced criticism of the British tabloid press fuelling ethnic stereotypes of one kind or another: *“that if someone is a Pole, then he lives off benefits. This seems to me utter rubbish.”*

The pattern that emerges from the narrative seems to be consistent. During this research, the criterion of social justice was applied consistently across a number of ethnic groups, including one's own, and those who were perceived as not contributing sufficiently were deemed undeserving, regardless of their ethnic belonging. In that sense the empirical material does not support a hypothesis that people are less willing to practice

principles of justice towards those who are perceived as belonging to an outsider group (Miller 2003).

One can argue that a strong attachment to conditionality of welfare and in particular to the contingency of welfare on work ethic, even among participants who faced structural barriers in actualising such views, stems from both pre- and post-migration experiences. This logic has direct links with the economic rationale of mobility, with the fact that the majority of Polish migrants arrived in Britain following market logic and embracing the roles of migrant workers. However one can also note that the emphasis on the desert-based criteria may have developed post hoc as a result of interactions with British welfare providers. During such encounters, Polish migrants are asked to present evidence of their contributions by virtue of economic activity. In that sense the desert-based criterion remains the only way of legitimating access to British social entitlements which has a high chance of being upheld by the hosts.

Membership logic

The final distinguished logic of engagement emerging from participants' narratives is rooted in claims to membership in British society. However the ways of thinking about membership in Britain are unconventional in the sense that they are not embedded in claims of national or ethnic affinity or common historic legacy. Instead one could distinguish two strands in this logic – the local membership referring to participants' corporeal presence in British local communities and the supranational membership underpinned by the common EU legal framework. Neither subnational nor supranational constructs of membership contained any elements of national affiliation. Both, albeit in different ways, referred to the variant of contractarian citizenship labelled by Thomas (2002: 332) as *“living together cooperatively”*.

Local citizenship

A high regard for localised public spaces such as parks, streets, playgrounds or transport and for people residing in a neighbourhood was seen as a constitutive part of a 'good citizen' persona. Thus respecting localised public goods was seen as one of the duties of a British social citizen. It was supported by a discernible identification dimension as over half of the participants who were re-contacted declared that they felt part of their local communities in Britain (see Appendix 9, Table 29).

Participants' identifications were also gauged during the interviews by asking which group of people they identify with. This resulted in the dominance of three types of

identifications which can be described as socioeconomic, value-oriented and localised. The socioeconomic identifications were expressed in such answers as *“I do not have work”* (Zenon), *“builder, how nine of us live together”* (Roman), *“with mums bringing up children”* (Agata).¹³⁵ The value-oriented responses emphasised the primary ties and shared values such as *“people with goals”* (Jolanta), *“circle of my closest acquaintances”* (Karol), *“very intelligent people, very honest, very frank, (...) people whom I trust”* (Wanda), *“people living together and I know that we could get help from them or they from us”* (Natalia), *“with acquaintances from work”* (Marta). Finally localised identifications stressed the communality and equality with people living in the same place and time: *“normal, like the others, not being superior or inferior”* (Sabina), *“like every single one here”* (Wacław), *“I, a Pole in Great Britain, resident of London, not feeling inferior to any average English person (...) I am like the rest here”* (Leszek), *“a small part of this machine”* (Marzena). Finally, a handful of participants noted that they identified only with themselves, being *“a bit of an outsider”* (Ola).

Arguably the elicited responses implied societal ties that are tangible, direct, corporeal, and functional and primary reference groups which are anchored in public spaces of local communities such as playgrounds, work sites or streets and private spaces of households and circles of friends.

Bauböck (1998) notes that migrants may have fewer difficulties in identifying with host societies as these tend to be oriented towards present and everyday time as opposed to past and future time orientation characterising cultural communities and polities.

Bauböck (1998: 331) argues that “societies are territorial units more than historical ones” representing “an ongoing scheme of cooperation for the mutual benefit of its members who live under a common political authority.” In that sense one does not need to share a collective past or have a view of a collective future to feel a member of a host society. This effect is enhanced in a localised society. Arguably this explains why membership in British local communities was less problematic for Polish newcomers than membership in the British nation or British society at large (see Appendix 9, Table 29).

One can add that local membership is also relatively decoupled from such traditional indicators of integration as knowledge of English or length of stay. As it was already

¹³⁵ The subjectively expressed socioeconomic identifications should not be confused with the objective socioeconomic characteristics of a person. For instance Bogdan, who was effectively homeless, stressed *“I do abide with these people but I do not identify with them at all.”*

noted participants who were informal carers and whose language skills were wanting, nevertheless managed to settle into their local communities and be “on excellent sidewalk terms” (Jacobs 1961: 62) with their neighbours from diverse backgrounds. One can argue that by following everyday routines – going to shops, banks, work, playgrounds, using public transport and familiarising themselves with the surroundings and its inhabitants – newcomers domesticate the local landscape and create a sense of neighbourliness, a sense of possession of space, of being “*at home [u siebie], (...) I feel that we are neighbours*” (Sebastian), “*because they know me and I know them (...) I feel that this is a kind of my little place on earth*” (Zbigniew).

As local membership is present time oriented it can be relatively quickly acquired by people who have not lived in a local community for a long time. Thus for example Wiktor (less than two years in London) and Leszek (one year in London) described their feeling of being part of London in almost Lefebvrian ‘right to the city’ terms (Purcell 2002; Purcell 2003):

“We all form a part of some society by going on a bus, walking on the street, you know, we are somehow, we form this urban society, this city is diverse as far as presence of people (...) and I try to identify with this.” (Wiktor)

“Because I live here, all that surrounds me cannot be alien to me. So everything, I go to the shops, I make use of goods which are used by English people. So I have never felt as though I am a visitor [przyjezdny], fearful and helpless. I feel like at home [u siebie].” (Leszek)

For some homeless participants, due to their haphazard lifestyles, local identifications were more problematic. Others however felt an integral part of the London streetscape. For instance Bogdan remarked “*I do feel part of a pavement in Ealing*”. One can argue that in this case the corporeal logic of local membership links up with the logic of needs, which are exhibited in present time and in specific locations thereby increasing their urgency and visibility. One can argue that needs displayed in local communities are harder to ignore, regardless what times and places they originated in.

The relative ease of local inclusion was facilitated by the uniqueness of London which is both a cluster of places, each with a distinctive local flavour, and a global hub imbued with a kind of pan-London multicultural identity. In particular participants perceived London as a place where “*society has not been created only by the English (...) it is part of a landscape that there are people who were not born here, who came here and this is natural*” (Ewa). Thus many participants felt part of “*this diverse society*” (Agata) and identified with “*guests, no matter what nationality*” (Ola). The fact that it

is easier to feel part of a society in London where one does not feel “*alienated, as someone who sticks out*” (Magda) was appreciated by many participants. Thus notwithstanding interethnic stereotypes and frictions over resources, many participants spoke enthusiastically about London’s vibrant multicultural environment. As Wanda stated “*in the UK I like multiculturalism, anonymity on request and greater opportunities for self-fulfillment*”. Only for a few participants London’s “super-diversity” (Vertovec 2007) posed problems by offering “*such mix here, one loses one’s own identity in this all*” (Dawid).

Many participants forged personal ties of friendship, trust, common outlook and reciprocity with native Britons and Londoners from all corners of the world. Thus participants’ narratives do not lend support to the view that generalised trust decreases in ethnically diverse communities (Putnam 2007). For instance when Waclaw was asked in which circumstances he particularly feels part of this society he pointed to the high level of trust characterising his interactions with people of different ethnic background and contrasted it with the low level of generalised trust amongst fellow Polish migrants:

“For example I know that when I agree here with a Black person or some Englishman, I tell him the price for this or that, so much, then I know that he, that I will do the work and he will pay me. And he is satisfied. And I have come across some, that I told him so much, he paid me and in addition topped up gratis. Let’s say 10 or 20 pounds, gratis. Because he is satisfied. And a Pole? A Pole would only look to rip you off [opierdolić].” (Waclaw)¹³⁶

In the view of such localised identifications, some participants were keen to have a say in matters pertaining to the functioning of their local communities. Participants who managed to find some time free from work or family responsibilities, had no language barrier and were not completely disillusioned with politics took an active interest in their local surroundings by using public facilities, thinking of providing some services locally, intervening on local issues with the council and police authorities, taking part in public consultations and voting (or planning to) in local elections in the spirit that “*a good citizen will surely pay attention to what is happening around*” (Irena).

¹³⁶ Polish social surveys show that Poles are characterised by a low level of generalised trust in ‘strangers’, government, parliament and some public administration institutions, and a high level of trust in people whom they know personally (family, friends, neighbours, work colleagues). Only 26% of Polish respondents in 2008 agreed with a statement that ‘generally the majority of people can be trusted’ however this represented an increase compared with the previous years (CBOS 2008). Thus Śpiewak (2005: 165) argues that Polish society is characterised by high instances of “asocial individualism” or “individualism of distrust” implying an atomised anti-community.

Taking part in local elections was often motivated by an appreciation of the recognition and respect shown to Polish migrants by the host society who “*invited to vote*” (Paweł). This suggests that the recognition of immigrants’ rights by the host majority in turn increases immigrants’ readiness to participate in public affairs. Voting in elections was also seen as a way of showing concern for the places in which participants resided.¹³⁷ For example Kazik voted in the mayoral elections in May 2008 “*because they gave me such a chance and I do not see a reason not to participate as the matter concerns me.*” Participants also voted in other local consultations or referenda – on the fate of local swimming pool, public library, housing development or parking charges. Furthermore taking part was also seen as an opportunity to voice Polish migrants’ claims to localised citizenship as “*one ought to go to these elections and show that one has here some rights and one is a normal citizen of this country, of this place*” (Marzena). Thus overall participants were motivated both by a desire to voice their opinion on local issues and to be seen as participating in their strife for recognition of the right to have a say:

“We ought to show them, show this community [społeczność] that we want to take part in this somehow, that we also have something to say, that we want to feel that we are a part of this society [społeczeństwo], that we have not just came here and live somehow apart [obok].” (Mateusz)

Legalistic supranational membership

In one respect the duty to obey the law was interpreted by participants to the Polish collective advantage. Participants such as Stanisław, Michał, Karolina, Sylwia and Karol rested their claims to membership in Britain upon inclusion in the common legal framework of European Union. This way of thinking portrayed the system as bestowing membership and accompanying rights and duties upon Polish migrants, who by being passive law abiding citizens become “*beneficiaries of the system*” (Marcin). Once such legalistic membership is granted it is in the hands of the system to specify conditions of access to rights. Once the conditions are fulfilled, the claims are justified. This view was best articulated by Ola:

“In order to take, one has to fulfil some conditions. If system assumes certain conditions that have to be fulfilled, then it means that those people have fulfilled them. That means that they are entitled. And if they are entitled, then why shouldn’t they take it?” (Ola)

¹³⁷ According to one study nearly 65% of Polish migrants interviewed in the UK and Ireland were aware of their right to take part in local elections and about a quarter declared a desire to vote (Garapich and Osipovič 2007: 33).

Some respondents went a step further and claimed that belonging to the common legal framework implied a degree of reciprocity, interconnectedness and mutual dependency between members of such a framework that had the potential to lead to some kind of generalised obligation towards each other, although stopping short of a pan-European identity and solidarity. Despite the fact that, as Mariola put it, the EU was more about *“the economy than society”*, Natalia pointed out that social entitlements are bestowed *“because we are somewhere somehow linked”*. Dawid noted that *“we mutually need each other”*. These newly established ties would result in reciprocal treatment of migrants from other EU countries in Poland when *“maybe in five years it will be the English who will be coming to Poland”* (Dawid). This arrangement was seen as *“simply fair”* (Dawid).

However participants did not endorse all the rights conferred by EU, perceiving some of them as normatively dubious. Participants were asked about their views on claiming British family benefits such as Child Benefit and Child Tax Credit by Polish migrant workers whose family members reside in Poland. This was seen by a number of participants as largely inappropriate. Such blurred welfare community membership was not viewed favourably. The practices were regarded as a kind of exploitation of the host welfare system by Ewa, Michał and Marcin:

“For example my brother’s friend who works here despite the fact that his wife and children are in Poland straight after a few weeks asked for sending their birth certificates in order to take benefits, despite the fact that children are in Poland. (...) To be honest, I do not entirely approve of such examples. I treat it as some kind of abuse.” (Ewa)

Kazik mentioned that he *“would feel bad if in Poland I had to pay for benefits to a Russian who has a child in Moscow”*. Only Ola had no opinion either way and pointed out that one needs to *“individualise”* such instances according to person’s financial situation and other circumstances before judging their appropriateness. The reluctance to endorse this transnational social right directly benefiting Polish migrants was somewhat surprising. One can speculate that this was because it was seen as unfair advantage on settled members of respective welfare communities and endangered the principle of desert especially as far as intergenerational contributions to the common good are concerned.

Rejecting naturalisation: “I do not need this citizenship”

On the one hand participants were not ready for a transnationally split loyalty to the welfare community, on the other hand they were also not prepared to assimilate culturally or naturalise by taking formal British citizenship. They came up with their own construct of citizenship which is disentangled from nationality but still unequivocal and localised rather than transnational. The choice of the host welfare community as the prime reference point was not premised on a shared culture or national identity, but on a sense of contribution and the feeling that one’s life goes on here, in this place. As Bartek explains:

“Because I am here, I live and I plan to stay, I have to feel part of this country somewhat. Because, as I say, everything is here, my life goes on somehow here. I have practically nothing in Poland, only my family, mum, dad, brother. And practically I go there for a week for some holiday or to visit [them]. But all the time I live here. Everything I do, I do here. And therefore I think that I should feel part of this.” (Bartek)

One can argue that this is another significant departure from Marshallian social citizenship paradigm which is tacitly anchored in the membership of a national community. Polish migrants rejected the conflation between membership in a welfare community and in a national community. In that sense participants clearly rejected the conflation between citizenship and nationality, as well as between society and nation as far as their allegiances to Britain are concerned. They identified with local communities in Britain in which they resided and to a smaller degree with British society as a whole, but felt no part of the British nation (see Appendix 9, Table 29).¹³⁸ The adoption of British national identity was not considered even by the respondents who lived in Britain for ten to fifteen years. For instance Magda stated *“I don’t feel British yet”*. They have taken on board the citizenship constructs based on desert, local identification and respect of the host state’s law, whilst at the same time trying to preserve solely Polish national identification.

Arguably, such a construct of citizenship was aided by the pragmatic factor of possessing European citizenship, which guarantees the bulk of rights to migrants residing in Britain and thus makes the pursuit of British passport less urgent. Leitner and Ehrkamp (2006) convincingly demonstrated that the reasons behind migrants’ naturalisation are mainly due to concerns regarding personal safety and security rather

¹³⁸ However it seems that participants maintained the conflation between ‘nation’ and ‘society’ as far as allegiances to Poland are concerned.

than due to shifts in identification (see also Rutter, et al. 2008). The prime motivation for becoming formally a citizen of a host state is to gain protection from the incursions into one's civil, political and social rights by the host and/or home state authorities. It is thus indicative that membership in the supranational entity of the EU, which confers a bundle of rights to EU citizens and enforces them through supranational courts, allows Polish newcomers to preserve their national, cultural and linguistic distinctiveness. Unlike migrants from outside of the EU they do not need to succumb to the process of "gentle violence" as Sayad (2004: 229) poignantly described naturalisation.¹³⁹ Jolanta summed it up:

"I do not need this citizenship, because I do not need to feel here... I can retain my identity as a Pole, I am not afraid that they will deport me from here (...) I can lead my life normally as a Pole, of course with respect [to British]."
(Jolanta)

Thinking pragmatically, many participants acquired or planned to acquire permanent residence permits (see Appendix 9, Table 30) and other 'useful' documents such as registrations with the WRS (see Appendix 6, Table 18). This was seen as making life easier for everybody, including the host authorities, as it helps with sorting out formalities like taking out loans, buying properties, running businesses: *"in order for it to be easier for me here, and simply for them as well, for this country here"* (Bartek). Wanda also noted that possession of a permanent residence card is important for securing social protection as she wanted *"to be sure that in crisis situations I can count on the same treatment as British citizens"*. Teresa noted that with this document *"one has greater rights to everything"*.

However despite (or perhaps because of) building a positive construct of membership in British society on the non-national basis – notably on the local level and as a subscriber to the social contract – participants saw few incentives to apply for formal British citizenship. Only 8 out of 37 participants surveyed during the follow-up stage declared such an intention (see Appendix 9, Table 31). Lack of plans to naturalise by Polish migrants was also noted by Rutter and colleagues (2008). The exception, albeit confirming Leitner's and Ehrkamp's (2006) view of naturalisation as a defensive move, were some gay and lesbian participants who planned to formalise their long-term

¹³⁹ For Sayad's (2004: 267-268) Moroccan respondent living in France the possession of a European passport was an emancipating experience: "the European passport does not really exist; it's an abstraction. (...) So, a national territory with which you have no relationship of allegiance (...) opens up to you as though you were in your own country and at the same time allows you to go on thinking that you are not in your own country."

relationships in civil partnerships and who were wary of whether and how their civil rights will be respected transnationally, in particular in Poland. For instance Michał who by the time of re-contact had formed a civil partnership with his British partner remarked that “*as a gay I do not feel comfortable [komfortowo] living in Poland*”. He wanted to apply for British citizenship due to lack of plans to return to Poland and because he wanted to live in the UK “*with the same rights as citizens of this country*”. Also participants who severed their ties with Poland for variety of reasons and linked their future solely with Britain did not exclude an option of naturalisation. Finally, a handful of respondents wanted British passports for their children.

Thus in some way participants began to acknowledge that some deficits of rights, such as full electoral rights, access to all occupational positions, full social protection, greater freedom of movement in the world may be only alleviated by the acquisition of the formal status of a British citizen. Thus one cannot rule out the possibility that participants’ views on the usefulness of British passports may change in future, especially if those Polish migrants who decide to settle in the UK want to enjoy the full set of rights, minimum restrictions and maximum opportunities for themselves and their children.

Foreseeing deficits of recognition

Overall one can conclude that participants wanted “*to subscribe [dopisać się] to this country*” (Bartek), albeit on their own terms. Yet at the same time they sought recognition and acceptance from the hosts. Thus when faced with the dilemma of which legitimation logic is more likely to be upheld by the British partners of interactions, participants chose an argument of their contributions in the UK as workers, consumers and tax payers. Thus the underlying principle of desert can be discerned even in the logics of needs and membership, which tend to view social rights as earned not as given.

Yet some participants had a lingering feeling that solely civic credentials might not be sufficient for achieving recognition in the eyes of British. The issue of recognition is essentially the issue of inclusion of outsiders into a polity (Dahl 1989) and of the right to have rights (Somers 2008). In the age of the nation-state reinforced by decades of “banal nationalism” (Billig 1995) such a recognition largely depends on the criteria of

national affinity.¹⁴⁰ However this is precisely the box that interviewed Polish migrants were not willing to tick. The majority of participants declared a relatively unproblematic cultural and national Polish identity and a firm attachment to Polish cultural and linguistic heritage, doubting whether they would ever be inclined to feel British in these respects.¹⁴¹

Participants noted that the lack of recognition as citizens of equal worth may have pushed some Polish migrants away from engagement towards isolation and a “*tendency to live in the Polish ghetto*” (Kazik). Some participants perceived the English as exhibiting condescending attitudes towards newcomers and preferring to keep a distance: “*They do not want to see us equal with them*” (Kazik), “*They consider us to be somebody inferior*” (Kasia). Marzena noted that although she feels part of British society on the level of everyday life and as a contributor to and user of public services, she feels alienated on the cultural or public discourse levels and lacks primary ties with English people. Such isolation may be further exacerbated by the language barrier and the difficult socioeconomic circumstances of newcomers focused around the constant pursuit of work, doing long and anti-social hours leaving little free time for social participation.

To sum up, the dissonance of membership experienced by some participants in this study seems to be due to the fact that claims to membership in British society on non-national grounds of local membership and desert-based logic were in danger of being rejected in everyday life encounters with the hosts. Arguably an awareness of the deficit of recognition explains why so many participants answered “*both yes and no*” (Lidia) to the question whether they feel part of British society.

5.6 The practices of engagement with London welfare institutions

Whereas normative views on redistribution of welfare and membership were shared by participants representing different socioeconomic and demographic groups, identified practices of engagement showed some divergence along two main dividing lines. The first line separated the experiences of those participants who had clear formal rights to

¹⁴⁰ One can note that the conditioning of belonging to the welfare community on feeling British is problematic not least because of the plurinational nature of the UK (Keating 2009; McCrone 2002). Furthermore Alexander and colleagues (2007: 797) argue that a sense of togetherness and community, so vital for social solidarity, is forged at the micro level of “complex and situational networks of relationships, founded on family ties, neighbourhood and friendship”.

¹⁴¹ A participant who declared Silesian national identification was an exception in that he expressed a strong sense of identification with the British nation, society and local community.

social entitlements from those whose eligibility was not clear-cut. Secondly, knowledge of English or the lack of it impacted the search for relevant information and interactions with providers administering welfare benefits, social housing and healthcare (see Appendix 6, Table 13). Thus these encounters were affected by the actors' multidimensional individual characteristics and their inclinations and situatedness within social context. The combination of these factors affected the process of substantiation of participants' social citizenship in Britain.

Sudden and long-term needs as triggers to engage

Whereas in the case of logics of non-engagement the emergence of welfare needs directed participants' gaze to solutions outside the remit of the host welfare state, the logics of engagement steered the search towards the formal institutions offering support.

The welfare needs of housing, medical attention or income subsidy or replacement may resurface or intensify as a result of various events in participants' lives. For example Wanda resorted to benefits after experiencing a sudden and traumatic break-up of her marriage, which turned her situation overnight into a single parent's one. Marek had to stop working as a self-employed builder after being diagnosed with a life threatening illness. Such situations have an immediate effect reducing the flow of income. Thus one category of participants made recourse to benefits, when their previous sources of income either disappeared or heavily contracted:

"My claiming benefits, using benefits is simply the consequence of a particular situation; I am not able to cope otherwise. I would not be able to afford to live otherwise, without help." (Wanda)

In contrast, other participants claimed benefits more as a way of making *"use of existing possibilities"* (Kasia) rather than as a way of coping with a crisis event in their lives.

Nevertheless these participants, mostly young couples with dependent children on a low income were also experiencing an increase in the costs of living, for instance as a result of an arrival of a baby.

Contemplating a social housing option could be either triggered by an immediate crisis event as in the case of participants who were in a desperate housing situation or it can be associated with a more general, long-term need for security, safety, stability and social protection. A single mother Sabina was on a brink of becoming homeless, facing eviction from her subrented accommodation. She preferred council accommodation as the way forward as she did not want to stay in informal subrenting and did not have any

savings for a deposit to rent independently. Many homeless participants saw social housing as a springboard to getting a better job, managing their health conditions and stabilising their family relationships:

“It would help me a lot because I wouldn’t have to wear myself down with these nuts [wariaci] in squats or parks. When one has one’s own flat then one can find a job one wants. For example doing something part-time. Otherwise... you come back each day and you aren’t sure what will happen at night when you come back.” (Bogdan)

For the participants who could not afford a move up to homeownership a secure social tenancy offered a promise of long-term stability which would allow the establishment of a sense of home. For example Marzena, a single mother, who during her seven years of work and stay in London had changed accommodation 13 times explained that getting social housing would enable her finally *“to live in your own place [na swoim]”* and to *“have one’s home”*. For those envisaging a longer stay in London an affordable, social tenancy would enable embedding a sense of home in some concrete, domestic space, which corresponds with a fundamental need for security:

“In order to have one’s own place [swoje]. One’s own, you know, something to own, to be able to live in peace. They give it and then for example I can’t rent it out later to somebody but I will go, I know that I will go to my own (flat), I can buy something. At the moment we are going from place to place [tułamy się] and we can’t afford to buy a flat ourselves.” (Natalia)

Apart from a constant prospect of having to move, single mothers such as Marzena and Wanda, who supplemented their income by claiming welfare benefits, came across the reluctance of private landlords and estate agents to accept them as tenants. They felt discriminated against by estate agents, who blatantly discarded any references from employers or previous landlords and assurances of regular payments of rent displaying as Marzena put it *“no dogs, no children”* attitude. Getting social housing would solve this problem:

“One wouldn’t have to worry, as for example we live here at the moment, everything is super but what if landlord thinks up of something (...) and gives us a notice and one has to search for a flat, and I see that there is a huge problem with flat search in my case, because I am on my own, because I am with children and they don’t want me.” (Marzena)

Social housing was also associated with a long-term investment opportunity due to the possibility of making use of the ‘right to buy’ option, which allows the acquisition of council property after a period of continuous tenancy and at a discount to the market

price. Thus some hoped that renting from a social landlord could potentially enable them to leap into homeownership in future:

“As far as I know I can buy out the council flat after two years for 30% of its value. And after the next two years I can sell it. So this is already a financial profit to me.” (Zbigniew)

“One lives 3, 4 years there, one applies to buy out the flat, they add £20 to the rent, spread it over 30 years and I own something in this life.” (Marzena)¹⁴²

Overall as banks were reluctant to lend money to participants whose income was considered too low or too irregular, the application for social housing was an attempt to move up the housing ladder.

Finally, healthcare needs do not only arise as a result of crisis events such as accidents or emergencies, but also entail a long-term strategy of ensuring the individual's wellbeing. The latter end comprises a range of measures such as preventative care, maternity services or managing chronic conditions. As already discussed, ignoring both types of health needs can have grave consequences including endangering the individual's life.

Information search – going alone and helping others

Generally participants did not accumulate information about British welfare benefits, social housing or healthcare in advance ‘just in case’, but began to search for the relevant information when faced with certain needs. The process of information search was affected by the person's knowledge of English. It divided participants into those who were able to identify and obtain relevant information and those who had to rely on various intermediaries. Respondents who knew English were able to contact the relevant institutions directly, such as council and jobcentre offices or the HM Revenue & Customs phone lines, thus cutting out the middlemen. For instance Emilia and her partner have been in London barely a month at the time of interview but came equipped with a good knowledge of English after living and working in the United States. They appreciated the psychological comfort of *“not having to rely on other persons, third persons for help”* (Emilia). Also Mariola recalled a smooth process of registration with a GP:

¹⁴² One can note that respondents overestimate the generosity of the ‘right to buy’ scheme which has been tightened up to prevent further depletion of the council housing stock in England and in London in particular (C&LG 2007a).

“I popped into the first encountered surgery and they gave me an internet address and then I phoned some surgeries where they have places and ... I went and registered.” (Mariola)

Unlike the participants who did not know English, Anna, Kasia, Lidia, Karolina, Michal and others found the information about social entitlements easily available as long as one proactively searched for it:

“People often complain that the access to these benefits is poor and so on. But I say: ‘well, hello, how do you think I found out about it?’ If one wants to find out, one is going to; one is going to search for it and so on.” (Jolanta)

Instead they tended to complain about the quality of information that is being passed on through the word of mouth or disseminated in the Polish diasporic media.¹⁴³ Jolanta noted the circulation of *“rubbish [bzdury]”* and *“fantastic stories”* among migrants. She attributed this to the animosity between the more established migrants and newcomers whereby the former are envious that benefits became too easily reachable by the latter. Emilia noted that Polish migrants who had resided in the UK for several years were not necessarily the most competent advisors. The same sentiments were shared by Krystyna who observed that the amount of information one possesses does not grow linearly with the length of one’s stay in the UK but depends on the *“internal resourcefulness [obrotność]”*. Sylwia was sceptical about the quality of information disseminated in Polish free newspapers which she felt was like *“looking for a legal advice in women’s magazines [‘Naj’ czy ‘Poradnik domowy’]”*. She was quite critical of the informational monopoly exerted by the ethnic businesses whereby a Polish website, a free newspaper title and an intermediary company are all *“suspiciously connected with each other”* (Sylwia). Thus respondents with a good command of English approached every piece of information with a critical eye. They tried to compare different sources and identify the most reliable one before carefully deciding how to act on received information.

Also participants with a good command of English were more likely to have English-speaking persons in their social networks – partners, employers, landlords, clients and friends – who in some cases provided them with initial information about social entitlements. One can argue that the lack of language barrier encourages the development of *“weak ties”* which are crucial for exchange of information and favours (Granovetter 1973: 1360). Anna relied on her British boyfriend for providing her with

¹⁴³ The fact that migrant community networks pass on both information and misinformation was also noted by Barnard and Pettigrew (2003: 27).

information on social housing. Natalia first heard about the possibility of applying for social housing from a local family who employed her as a childminder. Jarek and Beata received advice from their English acquaintance who used to work in a local council. Bogdan and Leszek had a “*Buddhist acquaintance*” and “*Black work colleague*” in their respective social networks, who explained the process of registering with a GP and recommended their own doctor. Thus in many cases the first port of call for information about social entitlements were English networks of respondents. This shows that some participants’ ties of friendship, trust and reciprocity with local residents were robust enough for the latter to share information even about such a valuable public resource as social housing. Thus despite the generally negative collective attitudes towards foreigners’ access to public goods in Britain, when it comes to individual cases English acquaintances were happy to share information and to direct respondents to the right institutions.

In turn participants who knew English often offered information and help to other people – family members, friends, acquaintances, flatmates, or workmates – whose English was limited. Jolanta, Anna, Natalia, Mateusz, Jarek, Beata, Magda, Karolina and others provided hands-on help free of charge. For example Jolanta helped many people to sort out their NINO applications, WRS registrations and in-work benefits. Such an intermediacy required considerable time investment and it was done whilst she was looking for a job as a special needs teacher:

“This time was not wasted, because during this time I sorted out for myself, my boyfriend, my acquaintances, my neighbours National Insurance Number and other formalities, I helped them to fill in forms. They were joking that I should set up an agency and take money for it.” (Jolanta)

Jolanta was very critical about charging people for passing on information which was otherwise made available to her free of charge. Perhaps in reality the interpersonal help and support are more common than the perceptions of withholding information among Polish migrants seem to suggest. The interviews indicated that there is a considerable exchange of free information both through ties with the host population and through ties with other migrants.

Information search – using intermediaries

For profit ethnic agencies

Participants who did not know English well were in a more difficult position. When it came to accessing relevant information about rights and negotiating the way around the

welfare system, participants' deficits of cultural capital had to be patched up by relying on either economic or social capitals, which were also unequally distributed. In that sense participants were engaged in the strategic conversions of various capitals into cultural capital (Bourdieu 1986).

Apart from fellow Polish migrants and free Polish newspapers, ethnic intermediacy businesses were a major source of information about welfare benefits:

“My wife also went to the (Polish) bureau. They told her in the (Polish) bureau that indeed we can get this and that, you earn this much, no problem, we will try to sort it out for you. And we tried.” (Bartek)

Such agencies operated across London in places with a considerable concentration of Poles and offered a package of comprehensive services targeted at newcomers which included help with obtaining national insurance numbers or residence permits, opening bank accounts, self-employment registrations, filing tax returns and submitting benefit applications. For example Marzena used the services of an agency to register her self-employment during which she was “*automatically*” put forward for Child Benefit and subsequently for tax credits. Since then Marzena's accountant customarily advised her on all legal matters concerning employment, benefits and social housing. Such agencies operated on a strictly ‘for profit’ basis and competed with each other and with private individuals advertising similar services in Polish press, shops or on the internet.¹⁴⁴ Some participants who used the services of such Polish bureaus knew English rather well but still preferred to consult a professional adviser before submitting documents or applications. They generally appreciated their function, however, some noted the diminishing utility of such services:

“I do not hold anything against them [nie mam za zle]. We are all here slowly finding out how to sort out some things and that this turns out to be much, much cheaper. Because prices are for example £60 for opening a bank account. This is really a lot. (...) Because this is 5 minutes of work and £60. Well, let them earn how they want. They have to. However if we know how to sort it out for ourselves then they will lose out, and we will gain.” (Natalia)

Sabina did not think that ethnic intermediaries deliver value for money as their mediation does not speed up the application process. Having spent a lot of money on buying various intermediacy services Natalia decided to try and extract information from Polish brokers without paying for it by making telephone enquiries. Yet a strategy

¹⁴⁴ For instance the “Polcentre” offered help with Child Benefit applications for £40, with tax credits for £40 and with Housing Benefit for £80. In addition every client was promised a ‘free’ EHIC card. (<http://www.polcentre.co.uk/cennik.html>, accessed on 27/08/2008).

was not always successful as agency advisors were reluctant to give out information “*as they make money out of this*” (Natalia). Thus ultimately the for-profit agencies and empowered migrants-citizens have conflicting interests as agencies’ survival depends on the constant stream of uninformed newcomers and lack of non-profit advisory institutions.

Other researchers of Polish migration argued that “profit-driven institutions” of migration industry actually facilitate the social and economic integration of newcomers and create more empowered migrants (Garapich 2008: 735). However one can argue that these companies operate according to market principles which sit uneasily with civic empowerment, even if the latter is an unintended consequence of the former. This is because the presence of competent citizens ultimately leads towards the self-destruction of such companies. Furthermore, on normative grounds social citizenship is meant to alleviate the inequalities in the distribution of resources created by the market. The ethnic intermediacy businesses both profit from and perpetuate such inequalities effectively monetising and marketising social citizenship and restricting its enabling functions.

Diasporic and voluntary initiatives

The mushrooming of profit-seeking advocacy and intermediacy was encouraged by a dearth of diasporic or voluntary initiatives that could offer similar services for free in the light of high demand. As far as the established Polish community is concerned there were ad hoc initiatives such as information meetings involving council officials organised by Polish parishes and social activists. One such workshop was attended by several respondents and they praised it as a “*great idea*” (Jolanta). Although informative, due to their sporadic nature such events could not meet the constant demand for information from Polish newcomers. A comprehensive “survival guide” containing basic information about living and working in Britain has been compiled and is regularly updated by the Federation of Poles in Great Britain (ZPWB 2008). More specialist diasporic services offering free advice on social entitlements were arguably overwhelmed with the inquiries.¹⁴⁵

Also the Polish playgroups for mothers and babies and Saturday schools provided an outreach platform to the local public services. For instance Basia found out about the

¹⁴⁵ For instance despite several attempts I was not able to establish contact with the East European Advice Centre in West London. The anecdotal opinions gathered during the fieldwork suggest that Polish clients found this service similarly inaccessible.

possibility of claiming family related in-work benefits from staff who run her local playgroup. Playgroups of course, as any public gatherings of Polish migrants, offered also an opportunity to exchange information with other attendees, an opportunity “*to gossip*” as Stanisław put it. During such meetings Stanisław heard about his entitlement to the Freedom Pass to London transport. Despite these initiatives the sheer scale of migration rendered them insufficient. Sylwia branded such a situation a “*failure of the Polish community*”. Zbigniew expressed his regret that long established institutions such as POSK are not sufficiently involved in educating newcomers about the long-term negative consequences of illegal employment.

Some participants relied on help and support provided by English charitable organisations, especially those specialising in services for vulnerable migrant workers. Apart from providing basic necessities – such as food, clothing, shower or laundry facilities – such organisations also offered limited help with translation, job search, benefit applications and other kinds of advocacy and intermediacy. For example Alicja was in regular contact with volunteers in one of the day centres who helped her to initiate and follow up her benefit application.

Local and state authorities

One could note that welfare state institutions themselves have a responsibility to inform citizens about the availability of social rights. Although some participants were in contact with such institutions, those who had a limited knowledge of English faced greater difficulty in accessing information directly ‘from the source’. Several participants used interpreting services in contacts with health services and Sabina relied on translation provided by the benefits authorities’ hotlines but there were also some complaints about the scarcity of information in Polish. Zbigniew argued that his local council “*discriminates against us*” by not providing leaflets in Polish despite Polish migrants constituting a large proportion of its residents and despite offering such information in other languages. Although provision of translation was seen by some participants as potentially demotivating from mastering English, others stressed its importance as it allows people to function within the remit of British law rather than “*to remain in an odd, unfair relation towards this country*” (Sylwia). As discussed obeying the law was a crucial element of the desert-based logic of engagement and thus any initiatives supporting this were seen as worthy.

Furthermore one can note a failure of the host authorities to provide clear guidelines as to the implications of the WRS scheme for migrants' social entitlements. Many participants wrongly perceived that registration with the WRS was optional. Many employers did not make a registration with the WRS a condition of employment. In some cases the perception of the 'optionality' of the WRS was strengthened even in contacts with the authorities:

"When we went to get an insurance number, I asked the officer 'what with this Home Office, is it necessary to register?' he just looked at me and said 'if you want; £70 and you are welcome (...) if you want to lose your cash, then you are welcome, this is just a document that you are here, nothing more'" (Tomek)

In the latter case the officer failed to explain the compulsory nature of the WRS registration and its implications for social entitlements. Furthermore respondents were confused or misled about the implication of the requirement to accrue 12 months of continuous employment. Some, like Sabina, waited for 12 months before applying for benefits, whereas others were able to secure some benefits whilst still accruing their 12 months period:

"I have worked a year and then submitted papers. (...) I have heard, that one has to have 12 months of work, of legal work" (Sabina)

"One can apply for Housing Benefit only after a year, one can do it earlier but then one has to sort out... ehmm there is some form, an exam, something like that and ehmm ... they can refuse it, they can accept it, but also they can refuse it, a year here is a kind of a trial period." (Joanna)

Despite the initial confusion as to whether the WRS was optional or compulsory and what was its actual purpose the participants began to realise that in practice it was difficult to access various social entitlements without presenting proof of the WRS registration:

"It's getting worse, more difficult to sort out things. (...) To get Working Tax Credit or Child Benefit or some sort, not having for example a resident (document) from here, it is difficult to get... But to tell the truth this is a good paper. This is a paper which one can get after a year of stable, legal work. It helps in many cases. Wherever one goes, wherever, if one shows a resident (document) it's different." (Bartek)

Relying on social networks

In their search for information, participants also resorted to help from their relatives, friends or acquaintances. In particular, participants who had close relatives or co-residing friends with knowledge of English could rely on considerable help in contacts with welfare services. This is not surprising as people linked by strong ties are more

ready to sacrifice their time and effort as each others wellbeing is in their mutual interest. Furthermore, the closer the relationship, the more generalised and deferred is the expectation of reciprocation. The optimal deployment of family members with knowledge of English sometimes required a change of household division of labour. For example Marek's wife was looking after her grandchild whilst their daughter was taking care of Marek's affairs in various benefit offices.

In contrast, Zygmunt anticipated that none of his 'weak ties' – a Polish nurse, a Polish pharmacist who befriended him, and a daughter of his acquaintance – would be willing to enquire on his behalf about his eligibility for benefits. Other participants worried about the inability to reciprocate favours to distant friends and acquaintances in the way the other side expects. For example Sabina preferred to ask strangers for help rather than jeopardise the relationships with people from her own social network.

To summarise, the picture which emerges from the interviews is a complex one. There is no doubt that participants who knew English had a considerable advantage over those who did not. Whilst on the interpersonal level the relatively vibrant, solidaristic flow of information from the well-informed to the ill-informed took place, on the level of the ethnic community the myth of ethnic solidarity was busted by the booming for profit intermediacy businesses and wanting non-profit initiatives. The information provided by local and state authorities in Polish language was also insufficient. In some instances, as in the case of the implications of the WRS scheme, it added to the overall confusion rather than helped to dispel it.

Encounters with public service providers

One can argue that the success of migrants' claims to welfare support depends both on fulfilling eligibility rules (formal recognition) and to some extent on the interpretation of those rules by the officers (substantial recognition). As far as eligibility is concerned, solely needs-based logic was generally recognised by the NHS institutions. In contrast the desert-based criteria of economic activity had to be satisfied when dealing with welfare benefits and social housing officers. Local membership was not formally recognised as a condition of access by any of three welfare state institutions in question, which instead upheld the rights stemming from the legalistic belonging to the EU.

It is helpful to group the experiences of participants who wanted to engage with the British welfare state into those with deficits of formal rights and those with clear formal rights. One can trace the processes of questioning and recognition of social rights by the

welfare providers in both cases. Although participants felt most strongly about the solidity and legitimacy of the desert-based logic of access to the British welfare system, the narratives show that even this logic was sometimes undermined by the host service providers.

Participants with formal social rights' deficits

Some participants' eligibility to social entitlements had been put into question by service providers. As access to welfare benefits and social housing depends on the connection with a paid labour market, various categories of participants with 'patchy' occupational histories such as unemployed single mothers (Sabina), non-working housewives (Kasia), participants with serious health problems (Alicja, Zygmunt, Bogdan), and undocumented workers (Zygmunt, Bogdan) faced barriers in accessing welfare benefits and social housing. With the exception of public healthcare, the cumulation of these characteristics meant that such participants were effectively excluded from the formal welfare state.

Encounters with welfare benefits providers

As discussed in Chapter 4 establishing ineligibility is not straightforward. The assessment leading to the conclusion that a particular EU migrant lacks social rights in a host welfare state is not an automated process, but requires taking all the individual circumstances into account. This case-by-case assessment often requires lengthy judicial procedures. In cases of temporary absences from the labour market due to unemployment, illness or childcare responsibilities it is often very difficult to establish whether such a person is entitled to any welfare benefits and if so to which specifically. On two occasions disputes as to participants' eligibility were channelled through the appeal process.

Alicja had been in a WRS registered job for over a year. She became unemployed and had an accident which incapacitated her for a considerable period of time. Having been refused contribution-based Incapacity Benefit she applied for Income Support but again received a refusal. Alicja appealed against the latter decision and won her appeal however the court's decision was still disputed by the Jobcentre officers. This left Alicja baffled as to the working of the British welfare system as she expected that the court's decision would take precedence over the benefit authorities:

"I don't know whether this is an officer's vagary [samowola], I don't know, I have no idea. I don't know all these procedures, regulations. (...) But this is very strange to me that the court doesn't view..., simply recognises that I am entitled,

that one has to pay it [IS] to me and what's more in an expedited way but an officer refuses everything, refuses to backdate it, to provide it in the future and to provide it now.” (Alicja)

The appeal process lasted about seven months during which Alicja was left with no support. In the meantime she was advised to apply for Jobseeker's Allowance: *“it made me laugh as I was not capable of taking on any work at the time, but they told me to apply”* (Alicja). Yet the diversion to JSA proved to be only a temporary solution as her payments were stopped precisely because she was not deemed “available for work” (Fitzpatrick, et al. 2007: 333). Eventually a benefit advisor suggested that the respondent enroll on an occupational training course which would restore her eligibility to the JSA. At the time of re-contact Alicja's financial situation took a turn for the worse as she was not able to claim any benefits at all and was still unemployed.

Sabina, a single mother, also had over one year's WRS registered work experience when she lost her job:

“I went to the Jobcentre and I said that I was fired, that I did not quit myself and that I don't know now which benefit to go for (...) whether for Income Support or some other, or Jobseekers (Allowance) because there is a lot of them, really. And she tells me ‘here is the number, please call Income Support” (Sabina)

Following the initial interview Sabina applied for Income Support but after one and a half months of waiting she received a refusal *“because I do not have a resident (right)”*. She appealed, lost her first appeal hearing, but won the second one.¹⁴⁶ However the latter decision was overturned by the benefit authorities as in the case of Alicja. At the time of re-contact Sabina relied on the JSA and a number of other related benefits.

These two cases are similar in that they repeat the pattern of directing to Jobseeker's Allowance as a ‘one size fits all’ type of benefit. This is because it is premised on the condition of at least intended economic activity and so it is easier to justify the eligibility to the JSA of economically inactive persons from EU8 countries. Yet the conditions of ‘availability for work’ and ‘actively seeking work’ accompanying the JSA may be difficult to fulfil in practice by people who have serious health problems or sole childcare responsibilities which limit the type of work they can do.

In addition these cases suggest front-line staff confusion as to the entitlements of EU8 migrants. In both cases benefit officers initially steered the participants to benefits to

¹⁴⁶ It seems that in the second case the court may have taken into account the fact that the respondent was a former worker who had a child in education. Following the *ECJ Baumbast C-314/99* this circumstance allows retaining the right to reside even though a person may not meet the criterion of current economic activity (see Appendix 11).

which they were not entitled. Hence Alicja noted that one cannot take for granted the information that is given out during the initial benefits assessment:

“It all takes place over the phone. And at the end of the conversation, a person who talked to me, the person who asks questions remains anonymous to me, he tells me that I qualify for this benefit, for this benefit and for that, ‘please wait for the decision’. I get the answer later that I do not qualify for any (benefit).”
(Alicja)

Confusion on the part of front line staff frustrated participants. Sabina noted that officers in jobcentres are rarely informed about the bigger picture or able to advise on anything outside their narrow field of specialisation as though they “do not have the right to know about anything else”:

“They do not know anything more. If you are on Jobseekers you are on Jobseekers. They only know about Jobseekers. And they do not know all details either, because they refer you later ‘please phone there to find out what you are entitled to further’. If you are on Income Support they (say): ‘we do not know everything, here is a phone number, please phone there and there you will find out everything what else you can, what else you are entitled to.’” (Sabina)

Overall the cases of Alicja and Sabina illustrate the difficulties of getting benefits by economically inactive migrants and the complexity of existing regulations.

Encounters with social housing providers

Residents of local authorities who are homeless or are in danger of becoming homeless should generally be given priority by local councils in housing allocation schemes (DirectGov 2008; Laurie 2004). This is sometimes referred to as the ‘homelessness route’ to social housing (Perry 2005). Out of twelve respondents who had been in regular contact with day centres for vulnerable migrant workers, four submitted their application for social housing. Yet it is difficult to judge whether the ‘homelessness route’ to housing was being applied in processing their applications as they were often themselves unaware what kind of housing allocation system was in operation in a particular local authority:

“I am homeless and I am ill, but what kind of system they have there, I don’t know.” (Bogdan)

Bogdan was registered as self-employed but as he never declared any earnings or paid taxes on his Construction Industry Scheme card (CIS) his status remained dormant. Instead he engaged intermittently in undocumented work with many breaks in employment often due to the worsening of his medical condition. His housing situation was precarious – he slept rough, squatted, and subrented informally in a house that

looked “*like a squat but apparently this is a council house*” (Bogdan). He approached his council for accommodation:

“They called me to the meeting. I had a long conversation with this woman. I’ve presented all my arguments, whats and hows. Why I need a flat. She went to find out, somewhere higher, I think she was away for about an hour. I don’t know what she was doing, whether she was crying, or whether she was talking to someone, or what. But eventually she said that she was sorry, ‘you have CIS card, had you have paid your taxes, you would have had a flat by now. But you haven’t used it, so as though you haven’t worked, so you have to work for a year, I am very sorry.’ I knew it will be like this. But one has to start somewhere, the application is in.” (Bogdan)

Bogdan’s case showed that experiencing an acute housing need is not sufficient for a successful claim to social housing. It exposed an underlying hierarchy of eligibility principles with economic activity being the most important one. Other circumstances such as being genuinely homeless and having serious long-term illness, which presumably would have earned Bogdan some priority points had he been a UK citizen, were disregarded due to his inability to satisfy the main requirement of documented economic activity.¹⁴⁷ It also exposed the participant’s expectation of rejection of needs-based logic, which he himself perceived as contentious. At the time of re-contact Bogdan’s housing situation had not improved significantly as he still slept rough but intended to rent a room upon the first pay from his newly secured job.

Sabina, a single mother who faced the prospect of homelessness, turned to her local council for help. She was the last sub-tenant in a property whose head-tenant vanished without a trace. Sabina refused to leave the property as she could not afford a move to renting independently and did not want to subrent illegally somewhere else. In order to proceed with her application she needed to present a formal notice of eviction to the housing officers. Yet due to the undocumented nature of her previous housing tenure there was nobody who would be willing to issue her with such a notice. At the time of re-contact her housing situation had improved in that she had managed to secure a council tenancy.

Alicja and Teresa who were also homeless for periods of time were also looking for some avenues into social housing. However, as they both would have failed on the criterion of economic activity, they both have been offered temporary social accommodation by charity organisations and housing coops. Alicja moved in to a hostel

¹⁴⁷ The requirement to allocate housing only to ‘eligible’ persons – distinguished primarily by their immigration status – is one of a few explicit constraints that central government placed upon the local government’s jurisdiction over the social housing allocation (Laurie 2004).

paid for by a charity organisation on a one-off basis. Although helpful this was not a permanent solution to her housing problems:

“Until they pay I live (there). (...) but they rented this room for other purposes (...) so I have already received some information that I will have to leave this room in a short while.” (Alicja)

Teresa on the other hand had been renting accommodation from a housing cooperative which was deemed unattractive to other potential tenants and which she shared with other people in similar circumstances. Yet the relationships between flatmates broke down, they fell behind on rent and some of them moved out. Due to joint liability, Teresa faced eviction, a court hearing and the prospect of paying all the outstanding rent. At the time of re-contact in spring 2009 both Alicja and Teresa had reverted to squatting.

Participants’ experiences show that the chances of getting permanent social accommodation by Polish migrants facing the prospects of homelessness in London are extremely small. This is because access to it hangs on the proof of past and present economic activity. However those who are economically active rarely face homelessness. One can argue that it is joblessness that causes homelessness in the first place, however homelessness then perpetuates joblessness further.¹⁴⁸ This is why obtaining secure housing was seen by homeless participants as a precondition of getting back to stable employment.

Instead, participants who had serious health problems were stuck in ‘Catch-22’ situation. They were unable to work because of illness and lack of housing, but required to work in order to become eligible for benefits and housing, which would enable them not to work, work less or work the type of jobs they were able to do.¹⁴⁹ Also a number of circumstances, including reliance on NHS care and family matters, prevented them from simply going back to Poland. Usually their family relationships were tense or broken thus they could not rely on support of their family members in either Poland or London. With exception of healthcare, these individuals facing multiple disadvantages were excluded from access to the formal British welfare state.

¹⁴⁸ Migrant homelessness is a complex phenomenon, a combined outcome of both social and individual factors, such as being a victim of crime or unjust treatment by others, simultaneous loss of job, income and savings, difficulty of coping in new situations, breakdown of family relationships, sudden traumas or losses, weak social networks, lack of knowledge of English, previous convictions, alcoholism, health problems and other factors that lead to a drop in mental and physical wellbeing which result in path-dependent downward spirals (Rzeźnik 2007).

¹⁴⁹ For instance Zygmunt’s medical condition limited the type of work he was looking for *“some light work, as I won’t go and carry rails or sacks. I could paint”*.

However one has to stress that despite the major deficits in formal rights to social housing, Alicja, Bogdan, Teresa and Sabina spoke rather positively or at least neutrally of their contacts with council housing officials who treated them courteously, sympathetically and within the rules. This once again suggests that even participants experiencing extreme disadvantage normatively endorsed the principle of conditionality of welfare and rejected the needs-based logic.

Gendered deficits of formal social rights

Conditioning social rights on participation in the labour market had a number of adverse implications for women migrants' position as social citizens. Women more often than men face disruptions of their employment careers due to care commitments (Ackers 1998). Yet domestic work and care responsibilities are not regarded a legitimate basis for independent entitlements to social rights. Thus some interviewed women with children relied on their working partners for derived social rights. For instance, Kasia worked as a childminder and did a number of other undocumented odd jobs before she had a baby and became a housewife financially supported by her husband. Yet this situation increased her dependency on her partner who became both wage and benefits' providers:

"He is here completely legally and pays taxes and thanks to this we have some benefits for the child (...) only due to his work, because I don't know, as far as I am concerned nothing counts for me." (Kasia)

The inferior position as social citizens may decrease women's leverage in private relationships. For instance Kasia and her husband had divergent preferences as to the place of residence in London and as to the duration of stay in the UK. Kasia felt relatively comfortable in her local community in London, where she managed to establish some local ties, whereas her husband wanted to move to a cheaper location which would uproot her. Moreover Kasia wanted to return to Poland as soon as possible where she could enjoy the support of her extended family in bringing up a baby, whereas her husband wanted to stay in London. One can argue that due to her weak bargaining position her preferences counted less than her husband's:

"I can pack and go even just now because to me this is truly, I would very much like to live in Poland, but (my) husband he is here, he is developing [rozwija się] here, he has a job, now he can find a job on his own here, he is very entrepreneurial [zaradny]" (Kasia)

They managed to reach a compromise with Kasia's mother joining her in the UK to help with childcare and to reduce her sense of isolation, whilst they try and save money for building a house in Poland and an eventual return.

In contrast to married and cohabiting women, single mothers could not count on their partners to provide them with a derived right to welfare benefits. They had to engage in paid employment themselves. Yet as childcare is extremely expensive in London most single mothers could not afford it. In these circumstances parents were often called to the rescue. Three out of four single mothers whose situation was disclosed during this research were able to summon day to day help from their own mothers. In most cases grannies were in charge of all housework and childcare. In one case however the grandmother was the main wage earner in the household allowing her daughter to spend time with a small child. Yet the daughter's continuation of entitlement to welfare benefits was ensured as it was her mother that carried out her work duties in her place and name. Thus grannies and granddads were playing a vital role in both single and two-parent households, allowing parents to engage in full-time employment and/or education. Such intergenerational households enabled a more efficient deployment of household resources in the labour market. One interviewed single mother could not rely on such help, as a result she faced a precarious financial and housing situation.

Participants with clear formal social rights

Participants who had impeccable economic activity credentials had unequivocal social rights to benefits and social housing as migrant workers. Also, generally all participants were formally entitled to use NHS healthcare according to experienced needs. Despite possessing clear formal rights their interactions with service providers were not as smooth and unproblematic as one could expect. This is because similarly to participants with deficits of formal rights they also experienced a degree of confusion as to their entitlements, delays in administering their claims and in some isolated instances even outright rejections. Furthermore some cultural misconceptions and differing expectations tainted the engagement practices with healthcare services.

Encounters with welfare benefits providers

At the time of interview 19 participants claimed at least one welfare benefit (see Appendix 6, Table 23). The majority of participants who claimed benefits were active in the British labour market or in the case of housewives had partners who were employed or self-employed. Benefits were claimed mainly by family units with dependent

children. Thus it is not surprising that the most common types of benefit claimed by participants were Child Benefit and tax credits (see Appendix 6, Table 24). It was common for respondents with dependent children to claim multiple benefits such as a combination of family and housing related benefits.

Respondents encountered many difficulties during the application process. The telephone mode of communication posed particular problems for some respondents. Apart from difficulties with recognising accents, telephone enquiries often left respondents in the dark about the identity of their interlocutor, without any proof that the conversation has actually taken place and without any guarantee that the initial information about the claim had been inputted correctly. Refusal by Jobcentre officers to deal face to face with prospective benefit claimants left Marek at the mercy of answering machines for weeks.

Answering questions on the forms posed some issues as well. Respondents complained about the amount of questions one needs to answer: “*whole books to fill in*” (Marek). Many questions were perceived as out of place, abstract, irrelevant or not applicable. Difficulties with understanding questions and often complex migration, work, housing and education histories rooted in a Polish socio-political context resulted in some respondents leaving blank spaces. Marek worried about committing a “*faux pas*” – being inconsistent about his circumstances in different forms and being found out.

Knowledge of English put some participants in a more advantageous position. Finding out about a particular benefit or service is just a starting point of a long process of communication with officials, which may require numerous follow-up letters and calls, amendments and appeals. These can be very costly to those relying on external help. Beata and her husband Jarek noted that such persons are more likely to give up on their benefit claim should they receive a rejection in the first instance, remarking candidly that this might actually play into the hands of benefit authorities:

“I think they know that many Poles do not know the language and that they have to pay for various services such as filling in [form] and sending it, so each time it costs a lot, when going round in circles, and people simply give up (their applications) ... this is a big plus [for the authorities] as this is very big money.”
(Jarek)

Their Child Benefit claim was rejected three times but they kept resubmitting the application “*till the end result [do skutku], because it did not cost us anything*” (Beata). The perseverance and assertiveness that comes with knowledge of language eventually

paid off. Cutting out intermediaries saved a lot of money and hassle also for Zbigniew, Anna and other interviewees.

Participants also encountered problems in obtaining definitive answers, for example, as to the type of benefits they are entitled to or a procedure that needs to be followed. As Mateusz noted sometimes *“one does not know which way to follow and which information is closer to the truth”*. Mateusz noted that one has to be very patient, assertive and know when and how to press officials in order to move one’s application forward. However it is a delicate balancing act as too persistent pressing might have the opposite effect from the desired.

A number of other participants raised the issue of waiting times accompanying applications for benefits. Joanna and her husband Mateusz were finding it hard to justify a three month wait from submission of a Child Benefit application to receiving the decision. When they enquired about the reasons for such a long wait they were told that officers have sixteen weeks to process an application and *“that this is just their good will if they do it sooner”* (Joanna). Also Marzena waited five months for her Child Benefit. It took Marek five months from the first telephone call to receiving the first Incapacity Benefit payment. Sabina noted that one has to be prepared for an average two months wait from submitting an application to receiving a decision. However one has to stress that in the majority of cases, respondents’ claims were successfully backdated.

In Marek’s case delays were partly caused by toing and froing between different officers and offices. Marek had to speak to at least five different benefit officers, none of whom were aware of the others’ advice. He and his daughter spent a lot of time setting up appointments and queuing in various offices just to explain Marek’s case and fill in the same forms time and again. Eventually Marek was assured by one of the officers that his documents will be sent *“to the right place”*, however this had not been done.

The glitches of the application process for some respondents claiming tax credits turned into positives. Agata, Kazik and a number of other respondents were overpaid the amount of tax credits. Agata termed this an *“interest free loan”* as they were not required to return the overpaid amount outright but rather it was taken into account in any future payments to which they were eligible.

Albeit not all, but many participants came across some problems during the application process which they described as long, arduous, messy and confusing. This left Marek with an impression that the outcome of such a process depends on the “*private interpretation [of rules] by every officer*” rather than clear regulations.

Encounters with social housing providers

Only two participants had a secure social tenancy with their respective local authorities. Each participant followed a different path to social housing. Magda arrived in London at the end of the 1990s and subsequently met her non-Polish husband here and stayed. Her husband managed to secure their first social accommodation from a housing association. Their family grew with the arrival of children at which point they were transferred to the local authority waiting list and eventually offered suitable accommodation. Overall Magda was very happy with her property and the social landlord. Likewise, Andrzej had been in London since the end of the 1990s. He was reluctant to disclose too many details about his acquisition of a tenancy on a small council flat but it is possible that having health problems and an inadequate accommodation could have prioritised his case:

“Illness (helped) a little. Illness... as one was ill a little. There are some unhealthy illnesses, yes, so ... Well, one has to... collect so many points and it will happen. If I was healthy then it wouldn't have happened.” (Andrzej)

Twelve further participants applied for local authority housing but at the time of interview had not yet received any offers of accommodation (see Appendix 6, Table 21). Unlike welfare benefit claimants, applicants for social housing were a diverse bunch. They included single people, couples with dependent children, couples without dependent children and single mothers. Some applicants faced extremely difficult housing situation whilst others viewed it as a long-term housing strategy and simply tried their luck.

At the beginning of the application process for both benefits and housing, participants were asked to present proof of current, documented economic activity in the UK. This included showing proof of registration with the WRS or proof of registration as self-employed with HM Revenue & Customs.¹⁵⁰ In one instance a housing officer seemed to

¹⁵⁰ Migrants also have to prove that they actually work and pay taxes as self-employed persons. So for example Bogdan and Zygmunt who had a CIS card but kept declaring a ‘zero’ income during their tax returns were not entitled to any benefits or social housing.

have been unaware that self-employed EU8 migrants are exempt from the requirement to register with the WRS:

“I am self-employed and I have the same rights as an employee with a contract but when I was applying for a (council) flat the lady asked me for the work permit, I said that I don’t have it but here is the certificate from Inland Revenue that on this date I have registered my company, here is the proof of my insurance contributions, my insurance number, here is my self assessment confirming that I have paid my taxes, that I paid money, tax... I do function here on this basis, as though she did not understand me ‘but ... where is your work permit?’” (Marzena)

Marzena did not manage to convince this particular officer that her self-employment entitles her to be treated on a par with workers registered with the WRS. Luckily Marzena had an exceptional situation as she worked for over a year as an employee for an agency, during which time she registered with the WRS. Thanks to this brief spell of contract work she was in a position to present her WRS registration certificate which made the officer *“happy that she received what she wanted”* (Marzena). Thus Marzena reflected about *“the gap between (...) what we have supposedly been guaranteed by our entry to the (European) Union and certain legal regulations which apply in Great Britain”*. One can argue that such experiences are indicative of a wider, already mentioned problem, namely the confusion on the part of service providers as to the eligibility of ‘new’ European Union citizens for benefits and social housing.

Respondents who managed to satisfy the criterion of economic activity were at different stages of their application process which consists of three milestones – submitting the application, assessment by housing officers and an offer of accommodation. None of the applicants has reached the last stage at the time of the interview. Applications from Marzena, Jarek and Beata were effectively dormant as they moved to a different local authority. Overall the assessment stage was seen by the majority of applicants as dragging at a snail’s pace and involving *“the fight with windmills”* (Zbigniew). As waiting for social housing in London can stretch into several years many respondents were rather sceptical about their chances of receiving a quick offer of a council flat.¹⁵¹ For example Marzena was advised not to expect a visit from a housing officer any time soon:

“Unfortunately just ‘wait for the visit’, ‘wait for the visit’, they accepted papers, put a stamp, and that’s all, we have phoned, enquired when somebody will

¹⁵¹ For example Enfield Council quotes on its website that there are around 10,000 households on its housing waiting list and only less than 1,000 are housed each year.
<http://www.enfield.gov.uk/84/index84.htm>, accessed on 22/09/2008.

come, when this, when that will happen, then the lady at some point began to laugh over the phone, she says 'well, these are years, years of waiting just for the (officers') visit, let alone of waiting for the flat.' (Marzena)

Marek was one of a few respondents whose application had already been assessed. However he failed to gather sufficient points due to having the 'wrong' kind of illness. Instead he was promised a review of his circumstances at a later date:

"260 points. And I can start thinking about a flat from about 600 points. Because my illness is not a heart illness (...) it is not rheumatism, this illness does not cause difficulties with walking, etcetera etcetera, they've listed it all." (Marek)

The system of priorities that councils operate makes the prospect of allocation even more distant for those who are not deemed to be a priority. For example Maria was convinced that her daughter who is a single mum will keep losing out to other, newer applicants who will be assessed as more needy. Marzena was convinced that the outcome of one's application ultimately lies in the hands of a housing officer and in discursive ability to argue one's case: *"A solicitor, English acquaintances, if such people are behind you, steer you, put in a word for you [wstawić się] then one can get a flat in no time [ot tak]"*. Thus the points-based system of assessment was perceived by some respondents as discretionary and unfair, always privileging 'other' groups – other illnesses, other ethnic groups, other family unit types, other life circumstances.

Encounters with the NHS

The majority of respondents at some point during their stay in London had been in contact with primary and/or secondary healthcare services such as GP surgeries, walk-in centres, ambulances, A&E departments, and hospitals. Participants suffered from various problems ranging from stomach flu, period pains, asthma and gallstones to cancer and heart conditions. A number of participants sustained various injuries and accidents such as broken limbs, twisted ankles, deep cuts, bruises and eye injuries some of which occurred in the workplace, mainly on building sites. A number of interviewed women made use of maternity services. Although the majority had to resort to medical help only occasionally, seven respondents could be considered as having serious health conditions that may require specialised care.¹⁵²

¹⁵² Specialised care is sometimes referred to as the so called tertiary care services defined as "highly specialised stage of treatment, usually provided in a specialist hospital centre" (NHS London, <http://www.london.nhs.uk/your-nhs-in-london/glossary-of-terms>, accessed on 15.10.2008).

Encounters with the NHS differed in one important respect in that there were no major issues regarding eligibility. Notwithstanding the inclusive nature of the NHS system, participants had little knowledge about it at the time of arrival. Thus one can note that the participants' ignorance and misconceptions about the healthcare system were the biggest barriers to accessing the NHS.

The initial period after arrival was characterised not only by the language barrier experienced by a considerable number of participants, but also by the lack of awareness of entitlement to public healthcare and of the scope and purpose of various parts of the NHS – GP surgeries, walk-in centres, A&E departments and hospitals. The majority of participants were registered with a GP (see Appendix 6, Table 25). Yet many mentioned that they delayed their registration for a few years after their arrival in the UK. This is because registering with a doctor was not a priority, unlike finding a job and accommodation. For instance Piotr, who arrived with his girlfriend just one month before the interview took place, stated:

“We are not at this stage yet, we are absorbed now by other things. We have got other priority issues to sort out. At some point for sure we will get round to doing this.” (Piotr)

In addition, as the respondents were mainly young and healthy they did not experience immediate health needs, which pushed registration with a doctor even further down the agenda. Furthermore many respondents had only planned a short-term stay which did not imply an immediate engagement with the health service and other public institutions. Overall registration with a GP was accompanied by a considerable time lag (usually two to three years) after a person's arrival to the UK. For instance only about half of the respondents who were in London for up to two years were registered with their GPs, compared with nearly all of those who resided in London longer than two years:

“I didn't want to stay here for longer and that's why it didn't interest me. (...) I went to a doctor for the first time last year, after three years. Because I had a huge problem (...). And I wasn't registered with a doctor before.” (Karol)

In many cases the registration with a GP practice was triggered by pregnancy or by some medical episode which often resulted in the prior usage of an A&E department. Only after a series of trials and errors – using walk-in centres and A&E departments –

participants discovered “*the best routes*” (*Lidia*) of addressing their particular health problems, for instance of obtaining a referral from a GP to a hospital consultant.¹⁵³

As far as access to the NHS is concerned, the majority of participants did not encounter any major problems. Even respondents who were unable to document their connection to the UK labour market, which prevented their access to welfare benefits and social housing, were nevertheless able to use both primary and secondary NHS care. As Bogdan noted: “*they do not want anything from me, only: ‘good that you came, we haven’t seen you for a while’*”.¹⁵⁴ Only two respondents were asked about their status in the UK whilst receiving care in hospitals. Ewa has not been registered with a GP when she broke her limb and had to use A&E department where she was questioned about the nature of her stay in the UK:

“After the check-up I had a conversation, I don’t know with whom, with a consultant, an administration worker, I don’t know. He asked whether I work, whether I am employed permanently, what do I do. All those things. And at some point I told him (...) well I pay National Insurance, so I feel that I can surely use it. And he in a kind of arrogant way replied that now everybody thinks that if they pay they can (use) everything. (...) He told me to fax the letter from work confirming my employment and a copy of my passport.” (Ewa)

Zygmunt was also enquired about his status in the UK after being admitted to a hospital:

“When I got a bit better they came from social [z socjalnego] and asked me who is my doctor, do I have insurance number or any other insurance. I said that I didn’t. And... how long have I been in England? I think this must have saved me that I had a CIS card which was valid for about a year then. And I showed it to them.” (Zygmunt)

Zygmunt’s experience indicated that the same CIS card with no declared earnings on it which was not honoured by the local authorities in social housing applications, was seen by health authorities as a sufficient proof of Zygmunt’s ‘ordinary residence’ in Britain which entitled him to receive free hospital care.

Rather than bureaucratic barriers in accessing healthcare some respondents had to overcome a linguistic barrier. Participants who did not feel confident with their English felt particularly insecure. Maria noted that being able to “*emphatically state*” how one

¹⁵³ A similar set of attitudes around the usage of health services such as delaying registrations with a GP, using A&E departments to obtain medical help, and differing expectations around services (especially maternity care) were noted in the Audit Commission (2007) report.

¹⁵⁴ This is not to deny that there are limits to the inclusiveness of the NHS in that some non-EU migrants may be required to pay for hospital treatment. Yet some accounts suggest that the NHS professionals are deeply uncomfortable with the drive to exclude certain migrant groups from accessing care (BBC 2008; Hargreaves, et al. 2006) and with being assigned policemen roles to determine patients’ eligibility for free treatment (Sergeant 2003: 34).

feels is crucial in contacts with health professionals. It is understandable that whenever possible, respondents preferred to rely on help with translation from their family members and friends. Otherwise participants used over the phone or face to face interpreting services arranged by the NHS. Maria's experience was positive:

"The ambulance came (...) doctor phoned and there was a woman, a girl, an interpreter, who translated. She talked to me and passed it on to the doctor. I have been served [załatwiona] very well." (Maria)

Zygmunt who spent several months in and out of various London hospitals noted that interpreters were not available everywhere and at all times. On some occasions he had to rely on Polish speaking hospital staff or just Poles met by chance. In the case of Zygmunt, whose English was very poor, the language barrier caused all sorts of misunderstandings, missed appointments, unscheduled visits and more crucially he lacked a clear picture of care that he was receiving:

"I came on Friday, there was no interpreter, she kept telling me something. I just asked whether 'is very good?'. She said 'OK, no problem'. But she wrote on the card that I should come in again next week. I came in next week, waited, the interpreter turned up." (Zygmunt)

In the absence of help with translation respondents tried to communicate more or less successfully using English phrasebooks, other languages – Italian, French, Latin phrases – and even non-verbal means. Others underestimated their knowledge of English. For instance three female participants who were given consultations on their pregnancy asked for an interpreter fearing that they would not understand the medical terminology. In all cases this turned out to be redundant as they managed on their own. Mariola even ended up correcting an interpreter who appeared to be from Ukraine and did not speak Polish very well.

One can argue that linguistic difficulties represent only one aspect of a wider problem of cultural misconceptions about the doctor-patient relationship resulting from a clash of two different 'health cultures'. The interviews revealed a mismatch of expectations during Polish migrants' encounters with medical professionals in the UK. In particular, some participants were baffled by the so called "patient-centred" discourse which may not be appropriate for intercultural communication (Roberts and Sarangi 2005: 638). In following such a discourse a doctor usually encourages a patient to take shared decisions as to diagnosis and treatment by asking opening questions such as 'What would you like me to do?', 'What sort of questions do you have? In contrast, participants expected a doctor to take the lead in examination and decision making.

Some, like Kasia, interpreted the patient-centred discourse as a sign of doctor's incompetence:

"I went once with (my daughter), she had a cough so bad [konkretny] that I thought that maybe bronchitis or something; well, and a lady doctor checked her and concluded that she did not know what this was, I say 'well but... so what should I do with the child ((laughter)), give her some syrup or what?' She says ... 'Well yes, give (her) syrup' I say 'Yes... so maybe (this is) the throat?' She says 'no'. She didn't even look in her throat... generally the doctor, she was asking me what do I want her to do with the child ((laughter)), what, how she should check, what do I expect of her... and eventually she just sat there and she says 'Well, we are not going to give her antibiotics as there is no need' I say 'well, I don't want to give the child antibiotics either' because you know once you start... I say 'But what actually is it in this case?' She... 'Well, I don't know because I can't hear anything on the lungs' and so on... She says 'Well, then we will give an antibiotic' I say 'Well, OK' and she prescribed this antibiotic, I picked it up from the pharmacy, I came back home ((laughter)) and I say to my husband 'Well, I don't know, listen...' (...) first she says that there is nothing there, then why should I give her an antibiotic? She gave it simply to get rid of me [na odzpeznego]." (Kasia)

Kasia's impression was not unique. Marcin was also quite surprised by his doctor offering him a choice of medication he could prescribe:

"I don't ever recall a doctor back home [u nas], taking their books out and checking. They must have it all in the head, that's how it is. And here (he) takes the book out and says 'Listen, I can prescribe this, this or that. Have you chosen something?'" (Marcin)

Marcin joked about his GP using the same communication code as he did himself every night giving out menus and taking orders from guests in a London restaurant. Marcin redirected the question back to his doctor using the common client's phrase "*Could you recommend something?*". One can note that gradually participants adjusted to the patient-centred discourse.

Furthermore the settings within which interactions took place such as small GP surgeries functioning in what looks like a private house and the fact that "*nobody wears white coats*" (Renata) altogether amounted to a rather unusual experience for patients. Yet whatever the unexpected discourses, decorations and props as Marcin noted "*eventually they will help you somehow and have helped me*".

As for women who used the maternity services the difference between Polish and British care during pregnancy and birth could not be any bigger. Yet after the initial shock some women concluded that the 'London way' may actually suit them better:

“At first it was all odd to me, that for example one does not visit a gynaecologist during pregnancy, all this ... back home [u nas] every month and generally every two months tests and here no, and this was to me ‘God, and what if something is wrong?’ but to be honest I know that if something is wrong then they care about it, it is just that there is no such panic as in Poland, there is no such ... I think, that thousands of prescriptions are issued to everybody and all pregnancies are endangered and all that ... there is no such panic with all this and I think, thanks to this I had a stress free pregnancy and birth” (Justyna)

Out of nine interviewed women who received NHS care during pregnancy and child birth only Beata had negative opinions but even she admitted that maybe this was because she had complications. Emilia stated that although pregnancy care is so markedly different than in Poland if *“children are born, everything is all right, then it means that this is how it is, this is how it functions and there is nothing to stress out about.”*

One can note that the participants were not the most docile of patients. Paradoxically, although most participants expected an authoritative approach from doctors, they were prepared to question this authority the minute it appeared. They were argumentative and assertive and were ready to employ the ‘I know best’ approach as Agata’s disagreement with a doctor showed:

“She says that 37 degrees is a normal (body) temperature, I say ‘No, this is not a normal temperature, 36.6 is a normal one” (Agata)

Jolanta remarked that thanks to the Polish education system equipping them with some background medical knowledge *“people simply know what they may suffer from”*. She contrasted this with an attitude of *“blind faith”* that in her opinion British people tend to put in doctors. This kind of alertness made some participants suspicious of the medical credentials of foreign doctors working in the NHS. A few respondents mentioned distrust in the competence of doctors from South Asia or Africa, especially when their origin was combined with a young age. This was because Joanna argued that a young doctor would not have had enough time to acquire sufficient medical knowledge and experience.¹⁵⁵ Mateusz was keen to stress that this cautious attitude had nothing to do with a racial stereotype but was merely a question of merit:

¹⁵⁵ Again as a benchmark Joanna mentioned the Polish education system whereby most medicine students begin their studies at an age of 19-20 lasting 6 years and followed by one year of internship. Thus in practice a doctor educated in the Polish system has a chance to start an independent practice only at the age of 26-27.

“The skin colour, this has absolutely nothing to do with it, it is just some of those doctors, they simply have, their medical knowledge is very weak, and I am afraid, I am afraid.” (Mateusz)

Respondents stressed on many occasions that assertiveness, persistence and psychological stamina is what one needs in contacts with NHS staff in surgeries and hospitals, especially when asking and waiting for referrals to specialists, specific tests or medication:

“One has to fight here for some things, one has to say oneself that one wants something to be done and one has to sort it out because doctors don’t know that ... hmm... that such matters should be sorted out here” (Mariola)

This was related to another widespread opinion, based on their own or second hand experiences that British doctors tend to prescribe paracetamol regardless of what ailments one presents oneself with. Bogdan attributed this situation to doctors being *“just afraid of responsibility (...) it’s better to give paracetamol”*. Renata commented on over reliance of British people on painkillers: *“simply in every house, when I was working, Christine twice in three hours swallowed two paracetamols!”*. However coming across a different health culture prompted not only criticisms of alien ‘ways’, but of participants’ own expectations. Some participants began to reflect on what they perceived as a potential overreliance on antibiotics in Poland:

“This is another good side, that they don’t prescribe as in Poland, a child has a mild cold or something then immediately antibiotic. Here it is exactly good because there is no such thing, only some syrups. Only when there is really some situation, only then you get this antibiotic.” (Sabina)

Recognitions and non-recognitions of formal rights

The claims to rights are essentially meaningless and non-effective without collective recognition. The substantiation of formal social rights of Polish migrants required entering into various interactions with service providers and fellow co-citizens and recognition of one’s logic of engagement by others. However, as already mentioned some participants predicted the deficit of recognition of the claims made on the basis of the logic of needs, membership and even desert.

Opinions about the manner in which respondents’ cases were dealt with by the benefit officers were split equally between positive, suggesting instant recognition of social rights and negative, suggesting discriminatory treatment. Justyna and Wanda described benefit officers as *“friendly”* and helpful. Many participants never encountered any

discrimination because of their nationality or other circumstances. Wanda felt she had been treated courteously and professionally:

“To be honest, I can't say a bad word. My experience is just wonderful as far as officers are concerned. (...) and information flow, if I am not sure about something, they are able to explain it all very neatly and lucidly.” (Wanda)

Also other participants – Patryk, Wiktor, Ryszard, Karolina – stressed procedural transparency and lack of ethnic bias in their contacts with officials in London:

“There is no difference whether you are English, American, Polish or Romanian or somebody else, they treat you by the book.” (Wiktor)

However not all experiences were positive. Participants came across a number of reactions which made them feel unwelcome in the host welfare community. Perhaps the most glaring instance of unprovoked rejection of desert-based claims to formal social rights was reported by Marzena in contact with a housing officer:

“The lady over the phone told me that council will not be helping people from Poland, from Czech Republic, Slovakia, Romania, she listed several freshly admitted, Lithuania, Latvia, that they simply will not. (...) as we have come here to work and not to attempt to get benefits or a flat, this is not for us... I was stunned and speechless [zamurowało].” (Marzena)

This experience left Marzena distressed. She complained and eventually received an apology yet the local authority was not able to establish the identity of the calling officer. Marzena wanted to take her complaint further but gave up after receiving a wrong complaint line phone number. The experience left her with a bitter feeling that she has been treated like *“rubbish [śmieć z ulicy]”*. This encounter strengthened her conviction about the arbitrariness and lack of transparency of the social housing application process.

Furthermore some participants suspected a hostility of Black and Asian officers in charge of redistribution of public goods towards newcomers from Poland and Eastern Europe, particularly those who did not speak English. The service providers have to follow the bureaucratic rules of procedural transparency. However as individuals they have their own views and preconceptions. Zbigniew was convinced that there is an ethnic twist to welfare administration in that officers from established ethnic minorities who once were at the receiving end of collective discriminatory attitudes now discriminate against the newcomers:

“If the area is multi-ethnic and for example in the NHS or the council there is a non-white person [kolorowy] then he will be nicer towards his own race,

towards native English whose mother tongue is English, towards Irish, Welsh, Scottish but he will not be nice towards a Pole, a Russian or other emigrants. Even towards an Italian he won't be (nice) because he sees him as white.”
(Zbigniew)

Also Marek felt that he was being treated condescendingly in the encounters with benefit officers. In his opinion the ethnicity of officers influenced the way in which he was treated:

“I don't want to be misunderstood, but when one comes where an Indian [Hindus] serves you, they talk to you very politely; but when one comes to a Black [Murzyn], then one immediately shrinks, lessens [kurczy się, maleje], because they do not know what ... because a Black officer is being in charge [urzęduje] there(...); one comes to a Pole, I mean to a white [biały], to a white, then a white (person) is not going to sort you out either ... they just refer you to this one, that one and this one, because I am not English [Anglik]” (Marek)

In contrast to his experiences of benefit officers Marek praised healthcare as the most colour- and ethnicity-blind service, where he never felt discriminated against as a patient:

“In the hospital it does not matter whether a doctor is black or white or a Hindu (...) It does not bother me that she is black (nurse). If she's a nice, polite girl, then, then, then here you go ... inject! ((laughter))” (Marek)

Zbigniew and Agata noted that their pregnant acquaintances were treated like “*a second class citizen*” (Zbigniew) by reception staff in GP surgeries possibly because they did not speak English. Agata's friend had been turned down by a number of GP surgeries despite being pregnant. These impressions led some participants to believe that there is a degree of antipathy and institutional discrimination towards Polish migrants.

It remains difficult to interpret such opinions as they may be a projection of participants' own ethnic and racial prejudices, a result of miscommunication, or a sign of administrative malpractice and inefficiencies mistaken for ethnic discrimination. Notwithstanding this the underlying issue of the way discrimination is defined and codified cannot be ignored. Multicultural policies based on the selective recognition of certain groups may run into problems of privileging some groups at the expense of others. For instance Zbigniew claimed that he was told by a police officer that “*discrimination is when a white (person) is discriminating against a black (person), and there is no (discrimination) if it's the other way round*”. In British public discourse “multiculturalism continues to be conceived of mainly in terms of the African-Caribbean and South Asian communities of British citizens” but this understanding may

be insufficient and outdated in such “super-diverse” places as London (Vertovec 2007: 1027).

‘Kombinowanie’ – learning new ways

One can argue that initial encounters with welfare providers set in motion a reflective and learning process aimed at a better understanding of providers’ way of thinking and of the overall setup of the British welfare system which could enhance chances of success during future interactions. In that sense, rather than arriving with already formed predispositions and strategies, participants learned to navigate the British welfare system and developed adaptive responses gradually. In the course of interactions, participants learned the appropriate discursive and behavioural codes which help to get things done. By experiencing the rejection of certain arguments and acceptance of others, participants are offered a glimpse into the complex eligibility rules governing various welfare benefits and social housing allocation schemes. With increasing knowledge of the host welfare system some individuals may be tempted to turn it to their own advantage.

Participants often referred to the practices of bending, circumnavigating and negotiating the rules as ‘kombinowanie’. The term mentioned about 40 times during the interviews can have both negative and positive connotations. For instance, White (2009: 3) translates this term as finding “a clever way of getting something done, often using social capital, [which] exemplifies the idea of combining various assets”. Thus ‘kombinowanie’ in certain contexts acquires neutral or even positive connotations akin to ‘trying to find a solution in a difficult situation’. For instance one respondent described that housing officers “*have been thinking for over an hour, trying to decide [kombinowali] what to do*”, referring to their exploration of all legal avenues of helping him in his difficult situation.¹⁵⁶

The practices of ‘kombinowanie’ were widespread during the communist period as a way of dealing with a chronic shortage of consumption goods in the “socialist welfare state” (Narojek 1991). Although the situational context has been transformed, the underlying traits of adaptability, flexibility, and inventiveness also remain useful in the free market reality. They help to work out new adaptive responses to the inefficiencies of the new system, i.e. new practices of ‘kombinowanie’.

¹⁵⁶ In order to enhance the anonymity of participants I refrain from using pseudonyms in this section.

For instance, in the case of the British social housing allocation system, this amounts to second guessing the ‘next move’ of the system in order to enhance the chances of success. Local councils are required to give a ‘reasonable preference’ in housing allocation schemes to people who are homeless, live in unsanitary or overcrowded conditions, need to move on medical or welfare grounds and to people who need to move to a particular area where failure to do so would cause hardship (Laurie 2004). In light of long waiting times in the ‘ordinary’ housing queues, some people may be tempted to enhance their chances of meeting the priority criteria. One can be tempted to ‘stage’ homelessness by arranging the coincidence of the expiry date of rental contract with an application for social housing, or by stopping rent payments and obtaining an eviction notice from the landlord:

“We were advised to do this, to stop paying... the landlord will take us to court, will get an eviction order and then council has to take care of such a family because it can’t leave them on the street, the landlord can’t throw us out on the street with a child, so council has to take us over, we will get some ... (...) temporary accommodation and and and ... in the end a flat. (...) but I am not the type of person who will take such ... steps”

One respondent tried a similar strategy in practice but failed to convince an officer to treat them as homeless as the respondent was already on the housing register and was being assessed via an ‘ordinary’ points-based route. Councils have safeguards in place against such strategies and can deny help to people who made themselves so called ‘intentionally homeless’. One other family was contemplating this strategy as a measure of last resort, being in the middle of a move and having encountered difficulties in finding suitable accommodation:

“The last resort solution would be to wait when the landlord comes here with a court order of eviction, because he can, as we had to leave this property last week (...) then they (council) have to give us some shelter, I don’t know, the hotel... I have no idea where ... to put us there with all this.”

Trying to go down the ‘homelessness route’ is not the only strategy. Some people may look for other factors to enhance their point score in future applications. For example, one participant was hoping to get a referral to a test for a health condition of the family member which could also speed up their housing application. Another respondent was looking to move their family into a smaller property so they would increase their points on the overcrowding scale next time they apply:

“To lower the conditions to ... to such minimum in which I can function but which to them looks sufficiently hard, so I would be entitled to the (council) flat,

and now I am at the stage of searching for such a flat.”

One participant who did not manage to secure social accommodation at the first attempt admitted that next time they will not think the “*straight way*” but instead they are going to “*wangle in order for it to be legal, as it should be [kombinuję, żeby to było legalnie, tak jak trzeba]*”. It seems that they stated this in good faith without realising the inherent contradiction in terms that such a statement entails. Fabricating and presenting a state of affairs that regulations prioritise was seen as a legitimate, “*legal*” course of action.

The scope for transnational practices of ‘*kombinowanie*’ was limited as far as social housing is concerned. One has to emphasise that there is nothing fraudulent in applying for social housing in London when one has a social tenancy or owns a property in Poland, as long as such information is disclosed. For example Ealing Council (2006) application form asks to disclose any social tenancies and properties owned. Presumably after disclosing such information an applicant has a very low chance of getting social accommodation. The majority of participants who either were social tenants in London or just submitted an application neither owned a property nor rented from a social landlord in Poland. Prior to coming to London they mainly lived with parents or in a privately rented accommodation. Although some participants were reluctant to talk at length about their housing situation in Poland, one applicant mentioned that they have a council tenancy in Poland which is looked after by a family member and another stated that they own a property in Poland.

A similar set of issues pertained to encounters within the welfare benefits system. Benefit fraud is a controversial subject, hard to define and grasp accurately which makes it prone to political exploitation. Sainsbury (2003: 278) defines fraud as “the deliberate misrepresentation of circumstances with the intent of gaining advantage”. Already this conceptual definition signals potential problems. Firstly the misrepresentation can be of non-deliberate nature, a result of a genuine mistake or confusion by the claimant or benefit authorities. Secondly, the misrepresentation of circumstances (either deliberate or not) can in some cases result in disadvantage rather than advantage. One can argue that the complexity of benefit rules and the state’s extensive scrutiny of the private lives of applicants and claimants make it difficult to differentiate between intentional fraud and genuine confusion.

It is important to stress that the majority of participants did not claim any benefits. Furthermore, the majority of those who claimed benefits adhered to all the rules. For instance when it came to informing benefit authorities about changes in their level of earnings or other circumstances participants reported as having done so promptly:

“I have been taking (tax credit) for less than a year, when I changed my job. I thought I have to check because I do not want to take something to which I am not entitled. And even more so I do not want somebody to think that I exploit the system. I phoned, reported my current earnings and they told me to return an overpaid month. So I did.”

“After a divorce I reported that (my) child is not living with me any longer. (...) And now they’ve stopped Child Benefit, they are going to pay it to my wife, ex-wife.”

Also participants did not exploit their transnational position. There were no instances of the so called ‘double claiming’ of the same benefits in Poland and the UK. The cooperation between Polish and British benefit authorities largely prevents such instances and participants tended to promptly inform the authorities of any benefits that they claimed in Poland:

“In Poland my wife was receiving the family benefit [zasilek rodzinny], some 49 zlotys. (...) If one wants to get it here one must give it up there. (...) but she forgot to close it down before flying from Poland. (...) It did not pay [nie opłacało się] for me to fly to Poland just to close this family benefit. But it was meant to expire in August. So we waited till August, it finished there and here they automatically awarded it.”

Nevertheless certain issues were prone to cause misunderstandings between participants and the benefit authorities. One of those issues related to disputes as to household composition and the local authorities’ assumption that co-residing family members contribute to the common household budget. One participant argued that his adult son who subrented another room in the same house had a separate liability to pay the landlord, separate budget and effectively a separate household and thus the participant’s Housing Benefit amount should not have been reduced.¹⁵⁷ This dispute showed that it is often not easy to distinguish in practice whether living arrangements represent a separate or a common household and even whether a household exists at all as in the case of homeless persons. This is because benefit regulations do not define clearly what constitutes a household.¹⁵⁸ The myriad of rules, exceptions and interpretations specific

¹⁵⁷ This is known as the so call “deductions for non-dependants” (Fitzpatrick, et al. 2007b: 204).

¹⁵⁸ For example the CPAG handbook contains eight pages of guidelines in which circumstances one is treated as ‘a couple’, ‘a family’ or ‘a household’ for the purpose of different benefits (Fitzpatrick, et al. 2007b: 713-720).

to a particular benefit result in the possibility that “you and another person may be regarded as members of the same household when you think you should not be” (Fitzpatrick, et al. 2007b: 714).

It is equally difficult to judge whether two people constitute a couple for benefit purposes if personal circumstances are not clear-cut. One participant and her partner were in a difficult financial and housing situation. Initially the participant included her partner on the benefit application form as she treated him as a ‘partner’, despite living separately. In turn benefit authorities argued that in such a case her partner should support her, so she resubmitted her application as a single person.¹⁵⁹ This case illustrates that the individuals’ take on their personal relationships may not always match the authorities’ assumption. Moreover, it is difficult to judge whether a respondent in this case is better or worse off in terms of the amount of benefits she can claim by not declaring her partner. Thus a mix of complex personal, housing, migration and other circumstances can lead to a genuine uncertainty as to whether or not a border between confusion and fraud has been crossed.

Moreover it is plausible that some participants had different assumptions as to where the border lies between the private and public sphere, how much of the state’s gaze into what they consider to be the private sphere they should accept, and what is the acceptable level of trust and honesty imbued in interactions in public sphere. Such assumptions can have an impact on what is seen as ‘normal’ when dealing with public officials and institutions. Some respondents were particularly wary about the increasing intrusion of authorities in matters concerning their children’s upbringing and welfare. One family chose to postpone a Housing Benefit application for fear of disclosing that they lived in a studio flat as they believed that *“I could go to prison as we do not have a right to live with our child in one room”*. Participants were becoming aware that help provided by the state comes with strings attached. In return, welfare users are expected to show a degree of docility, have to conform to strict rules and they may be ‘policed’. Paradoxically as the next quotation suggests, one person’s attempt to adhere to the child welfare rules might make them breach tax credit rules:

“Because (my child) is still small, so generally I have to take care of (my child), I have already lowered my hours from 32 to 25, and yet still I plan to report only 20 hours in Working Tax (Credit), so nobody could accuse me of not taking care of (my) child, because here... these rights, ‘parent – children’ relations are

¹⁵⁹ In this case benefit authorities most likely would not treat them as a ‘couple’ because they do not live together (Fitzpatrick, et al. 2007b: 713).

different than in Poland, and here if one has a child then apparently 20 hours is already (max) (...) and the rest one has to devote to a child.”

According to Sainsbury (2003: 279) not declaring an income from work or claiming as a single person whilst living with someone else can be considered as clear-cut instances of fraud. Undocumented work has direct links with potential benefit fraud as periods of undocumented income can create ‘gaps’ in earnings on tax credit forms, which in turn lower earning threshold and increase tax credits. One respondent mentioned that there was a three month gap in their last year’s tax credit application during which her husband “*let’s say ‘he didn’t work’*”. Another respondent included lower earnings from Poland in place of undocumented earnings from London on their form and this resulted in an overpayment of tax credits. On two occasions one could suspect that respondents did not declare other people living with them – a subtenant and a close relative who was employed full-time – who most likely were contributing to the household budget. These respondents appeared however rather oblivious to such transgressions. Possibly because they thought that whom they choose to share their accommodation with and on what conditions is their own ‘private’ matter, which should be of no interest to the state authorities.

Unlike in the case of benefits and social housing the scope to engage in fraudulent practices as an NHS patient remains fairly limited. This is mainly due to the inclusive nature of this area of social citizenship, guaranteeing a universal, unconditional access to all who need it. However in part because of this inclusive principle of access to the NHS there is a great deal of public anxiety that the NHS is being exploited by ‘health tourists’ – people from abroad who come specifically to take advantage of the NHS treatment (Dwyer 2000; Hargreaves, et al. 2006; Sergeant 2003). Such worries are unfounded as far as the case of Polish migrants is concerned. This is because the rationale of Polish migration to the UK was as far as possible removed from healthcare seeking mobility and involved a flow of predominantly young, healthy and labour market oriented individuals. Secondly, as will be discussed next, the NHS received rather mixed reviews from participants and a lot of negative press in the Polish migrant community. This study found that health tourists may in fact flow in the opposite direction as many participants travelled to Poland for regular check-ups and in order to top-up or even substitute entirely British healthcare with a Polish one.

The NHS may be somewhat open to practices of ‘*kombinowanie*’ because of its function as a gatekeeper, issuing certificates, ‘testing’ people’s conditions and vouching

for them. For instance one respondent admitted that he obtained a sick note from a doctor by pretending the illness:

“I had to lie a bit that I am ill, that I have a cold and so on and that I would like to have a sick leave because I would like to mentally rest from work. And he wrote that I have a flu. (...) I simply wanted the spare time to go to Poland and I did not want to use my holidays so I had to have a sick note.”

Some respondents perceived the practices of exploiting the welfare system as quite widespread among Polish migrants, others however noted that it is not “*some kind of Polish speciality*” as on the other hand they personally knew English people who “*don’t have to use wheelchairs as they are perfectly capable of using their own both legs.*” One can argue that it is likely that the perception of fraud is greater than its actual scale due to the impact of coverage of this phenomenon in the media (Sainsbury 2003), including Polish diasporic media or internet forums.

The majority of respondents condemned these fraudulent practices. However what is interesting is that some participants both condemned ‘*kombinowanie*’ and actually deployed it in practice. This once again illuminates the gap between the norms and values that people aspire to and the reality where the normative shortcuts are made. It also highlights that transgressions of the rules are not committed by some deviant, wicked individuals, but by ‘*people like us*’ adhering to mainstream values. Summarising the British research evidence in this area, Sainsbury (2003: 287) argues that “while fraudulent cultures might develop, these do not, for many of the individuals involved, conflict with or undermine a more dominant culture based on an acceptance of the moral value of paid work”. The author concludes that the root causes of benefit fraud do not lie in the moral inadequacy of individuals, but are better explained by the functional inadequacy of the system, the rigid and somewhat anachronistic rules, which fail to give full regard to the contemporary, fluid patterns of family and work life.

Evaluating the public goods

Evaluation inevitably accompanies the learning and adaptive processes. Those who were able to make use of their social entitlements assessed whether the British welfare system delivers the promised goods against both benchmarks of a Polish system and of generalised normative expectations.

Welfare benefits

The financial help in the form of benefits was praised by those who were able to make use of it. For single mothers and young families with dependent children a supplementary income from ‘in-work’ benefits was a very important part of their family budgets. It enabled them to make certain leaps in living and housing standards and to invest in their children’s future. Basia, Joanna and other ‘stay at home’ mothers were enthusiastic about receiving tax credits which often amounted to equivalent of what they could earn working part-time or even full-time in low paid work. The epithets such as “*revelation*”, “*brilliant*” and “*wonderful*” were used to describe tax credits and Housing Benefit. In the case of working single mothers benefits allowed them to maintain a comfortable livelihood, “*the minimum that I require in order to function normally*” (Wanda), providing “*second wages*” (Marzena).

The receipt of benefits cushioned the impact of the initial period of stay in Britain which for many newcomers is the most difficult one. The availability of benefits encouraged some participants to establish a family and have children in the UK. The generous family benefits were seen as partly fulfilling the function of the more all encompassing support of the extended family in Poland:

“In Poland the state does not help us a lot (...) but (people) have family close by, let’s say mum will make a dinner or something, hmm... and wife can go, I mean both can go to work in such a case; here we are alone, so I would have to send her to a nursery [przedszkole], and nursery is quite expensive here, this would be £250 a week, I am not sure whether I could even earn this, so the state here takes care, takes care of us, we do not feel any (difference), we worked both before, now only one of us works and there is also a child.” (Mariola)

Receiving benefits, in particular Housing Benefit, improved considerably some respondents’ housing situation. For example the lump sum of backdated benefits put towards a deposit enabled Marzena to make the leap from subrenting to independently renting a property which could comfortably accommodate her family. Also, participants like Mariola and Dawid moved from subrenting to renting independently. The increase in costs of such a move was mainly covered by Housing Benefit.

Receiving benefits not only enhanced immediate living standards but in some cases also permitted a long-term investment. A number of respondents saved up the amount of Child Benefit and occasionally also tax credits in Child Trust Funds. This was seen as both an insurance policy and an investment fund for a child, meant to ensure a better “*start in life*” (Kazik).

The financial situation of persons who relied on out-of-work benefits was considerably worse. Nevertheless these benefits also offered a welcome safety net. For Sabina this allowed her to reach an acceptable living standard for the first time:

“Although I cannot afford everything but I can afford the normal life, I do not have to worry that next day I have nothing to give my child to eat, as it used to be in Poland.” (Sabina)

Receiving regular weekly payments of Pension Credit freed Andrzej from worries and made him “*calm*” that “*there is money every week*”. Andrzej was out of work but had not yet acquired pension rights either in Poland or in the UK and thus his situation was particularly precarious.

All in all respondents praised the “*benevolence [przychylność]*” (Bartek) of the British state as far as benefits were concerned. Mariola noted that “*the state helps here*”. Danuta admired “*English government ... and English law*” for providing people with both work and benefits. Stanisław welcomed the fact that the state cares about its citizens or future citizens who require some extra help such as single mother, pensioners and children.

The downside of claiming benefits was mainly psychological discomfort of being dependent on somebody else. Wanda noted “*that it is not commendable [chlubne] that I am partly provided for by the state of which I am not a citizen*”. Furthermore a number of participants were concerned about the high amount of information about one’s private circumstances that one needs to disclose when applying for benefits. Some participants postponed or withdrew their claims, in particular for Housing Benefit, as they were unwilling to open up their housing arrangements to the scrutiny of benefit authorities.

Although praising financial security, ‘stay at home’ mothers noticed that the receipt of benefits diminished the economic sense of their potential return to the paid labour market. This disincentive particularly affected participants who faced the prospect of a return to low paid work which, when combined with the high costs of childcare in London and forgone benefits, kept them bound to the home sphere not always by their own choice:

“On the one hand what I will earn, they will take it from me, I will be in the same position, but on the other hand I want (my child) to go to nursery, when she’s ready she should go to nursery, and I would like to go back to work ... because I do not belong to women who just like to sit at home.” (Mariola)

“This system is set up rather oddly as it does not pay [nie opłaca się] to go to work, well, I mean of course if I go back to work where one earns a lot, then it would be different but ... I just do not have such a possibility.” (Beata)

Thus married or cohabiting women who decided to temporarily stop their work in order to look after their children were second-class social citizens not only because their work at home did not lead to independent benefit entitlements, but also because a particular social policy solution erected financial disincentives to going back to paid work, the only available way of breaking their financial and social rights’ dependency on male partners. This seems unfair considering that work was the ultimate value for the majority of working age participants. Those who were temporarily out of work spoke about their desire to find a suitable work as soon as possible. Looking for work – stable, decently paid, the right kind – and not remaining on benefits was the main ambition, aspiration and objective of the majority of participants.

Social housing

Participants who were social tenants appreciated the affordability of social housing compared with other housing options. Magda appreciated the affordability of social housing bearing in mind that owner occupation remained out of reach to her family as *“the prices grow out of proportion to our... saved money.”* However the evaluation of other aspects of social housing reflected the wide disparities in standards offered by social accommodation. Magda and her family who occupied a spacious council property in outer London suburbs had nothing but praise for her housing conditions, neighbourhood and neighbours. In contrast, Andrzej has been living in a small flat on a council estate in the inner London and had to put up with thin walls, lack of central heating and problems with damp:

“I have installed heaters myself. (...) As (neighbour) did not heat in the winter and the walls are black. These flats are not that good.” (Andrzej)

The lack of soundproofing exacerbated Andrzej’s relationship with his neighbour: *“I am beating my chops, he knocks on the wall. One has to have nerves.”* Despite these inconveniences Andrzej was *“satisfied”* with his accommodation and appreciated lower costs of council housing compared with rents in private sector. Social tenants in a temporary accommodation also experienced problems with flatmates and neighbours. Alicja noted that her neighbours in a temporary hostel lost a *“sense of good manners”*. She opted for a non confrontational approach:

“Sometimes they disturb me because they shout at night, they behave rudely [po chamsku] and loudly. But I try to keep a distance (...) I am not at home [u siebie] and I simply try to be nice.” (Alicja)

In contrast to actual social tenants, the applicants for social housing failed to see any negative sides to it. They saw it as an option with no drawbacks which they hoped would introduce more security and stability into their housing situation. Respondents did not voice any concerns about the social stigma accompanying social housing or physical conditions of council properties:

“Well, social [socjalne] flats, you know, these are perfectly decent flats. I have been to such a flat. So I have seen it, you know. Well maybe I have seen only the good flats maybe there are also bad, you know.” (Maria)

However there were also participants who held negative opinions. Despite not being able to afford home ownership in the nearest future in London they did not want to apply for social housing. They were concerned about a number of issues. Wanda, a single mother, viewed as she put it “*council ghettos*” – the concentration of social tenure in one space – as “*a very bad idea which does not lead to anything good*”. So Wanda, Agata, Mateusz and other participants did not view social housing as an appropriate social and physical environment to raise their children. They had concerns about safety, the standard of local schools and inadequate role models for their children. The actual housing standards and in particular the prospect of living in a block of flats discouraged Basia, a young mum, who claimed that “*home is space*” and preferred to share their house with others than to live “*in a tin*” as she put it, having no access to outside space. Instead of applying for social housing these participants preferred to rent privately and planned to claim or already claimed Housing Benefit. The latter benefit was seen as a great help with renting privately which crucially allows retaining control over where one lives, the issue which these participants deemed important for their own quality of life and their children’s upbringing.

A number of participants noted the residualisation of social housing which increasingly served people who had nothing rather than people on modest incomes. In Karolina’s view “*one has to really experience real poverty for a while or at least pretend to experience it in order to get such a flat*”. Thus some noted that the criteria for housing allocation are a disincentive to save and to work. Allocations of social housing to ever poorer tenants result in the spatial concentration of poverty. Even Wanda, a single mother, aside of her private reservations, noted that “*the mere fact that I am a working person means that I have no chances for such a flat*”.

Thus some participants were put off from applying for social housing not so much because of negative opinions, but because of the sheer scarcity and strict rationing of this resource, anticipating that they have no chance of getting it. Kasia was put off by “*years of waiting*” and Ola by being “*at the end of the queue*”. Similarly Ewa, Bartek, Kazik – being single, childless, in good health and in full-time employment – did not belong to any ‘priority’ groups and as a consequence they did not see any point in investing any effort to pursue this housing option.

Overall participants were quite polarised in their evaluations of social housing as a potential option to consider in their housing career. The majority of respondents did not see it as a desirable option mostly because of the negative opinions about social housing that they held. On the other hand a substantial group of respondents – among them single mothers, homeless persons, and people with serious health problems – had a strong preference for getting onto the ‘social housing ladder’ which they saw as a secure, stable and long-term housing tenure, often an exact opposite of their hitherto precarious housing circumstances in London. Actual social tenants had mixed positive and negative opinions reflecting the disparities in social housing quality across London.

NHS

The participants had similarly polarised views about healthcare provided by the NHS. Some had either negative or positive, but the majority mentioned both what they liked and disliked about the British healthcare system. One has to emphasise that migrants from Poland come from an altogether different healthcare system. The unfamiliarity alone made some respondents wary of the NHS. As Maria put it “*I think something is not right with this healthcare system, generally speaking.*” Many respondents based their negative evaluations of the system on second hand opinions. For instance Paweł had been in London for about five months at the time of interview. He was not registered with a GP and was not aware of the structure of the healthcare system. Nevertheless he already formed a negative opinion about the NHS on the basis of information provided by his Polish work colleague, which replicated a number of stereotypes circulating among newcomers:

“English (doctors) do not want to give out sick notes to Poles because too many Poles began to get ill (...) and when one goes to a doctor, when a Pole goes to a doctor, they will prescribe them an aspirin, or something just to get rid of them.” (Paweł)

Thus various stories that allegedly happened to friends' friends were passed on by word of mouth. A man dying on the building site because the doctors failed to spot appendicitis, arm necrosis due to an improper wound treatment in the A&E department, failure to diagnose kidney inflammation in a child, treating pneumonia with nurofen – these are just a handful of negative second hand stories mentioned by participants. It is impossible to verify them independently and assess their reliability. Not many respondents withheld their judgement until they actually experienced the NHS themselves. In some cases even their own positive experiences were dismissed as mere “*luck*” (Natalia) or “*coming across a good doctor*” (Kazik) and did not change an overall negative rating.

In the light of the bad press of the NHS many adopt ‘expect the worst’ attitude and some are subsequently “*pleasantly surprised*” (Karolina). In particular there were a number of positive aspects to the NHS that participants mentioned. The fact that in most cases, treatment and medication are free of charge was welcomed by interviewees on low incomes. This was seen as an advantage compared with the costs of similar services in Poland:

“There is no (case) that you have to pay. That you are in a difficult situation and you won’t be able to buy your child the medicines. No, (...) here normally you’ve got everything for free.” (Sabina)

“I got prescribed medicines for ####, there in Poland I had to pay but here I have got it for free, I think for pensioners this is a great deal better [o niebo lepiej] than in Poland as pensioners in Poland do not have big pensions but medicines are expensive.” (Stanisław)

In addition participants receiving tax credits were able to obtain further help thanks to exemptions from charges for dental or eye care. This covering of the associated costs of receiving treatment – such as medication or even transport to and from hospital – came as a surprise to many. For example Sabina kept asking her doctor “*automatically [odruchowo]*” whether there was a cheaper alternative to the medication that she was being prescribed. Michał noted that it was “*rather interesting*” to receive a box of antibiotics for free from his doctor. Overall free access to a range of services and medication was greatly appreciated by participants who had to survive on tight budgets during the initial period of stay in Britain.

Furthermore the coordination of the information flow between laboratories, GP surgeries, and consultants in different hospitals which was important to those with serious health conditions, organisation of patient records and good quality hospital

equipment were also mentioned as positives. Participants who had serious health conditions commented positively on such aspects as free access to highly qualified specialists, medication, tests and equipment. Two respondents compared favourably the speed with which they received a treatment in the NHS with the time they might have had to wait for the equivalent treatment in Poland:

“I am very satisfied of what I came across here in this respect and and and well... I do not have any reasons to complain about anything...” (Marek)

The promptness and “*organisational professionalism*” (Marcin) of the London ambulance service was also praised as well as joined-up thinking with other emergency services such as police. For some women, easiness of getting contraceptive pills which again were free also made a positive difference. The stress on prevention, such as invitation letters for periodical screenings and lifestyle advice were assessed positively. Last but not least the good points of the British healthcare often reflected the bad aspects of the Polish system. As Andrzej remarked: “*It is better to be ill in London (...) nobody takes money, there are no bribes here*”. There was also something that Marcin termed “*humanism*” of the NHS, meaning the fact that one “*could be a man from nowhere*” and one will not be denied care and attention by NHS staff. Again this was contrasted with the Polish system where access to public healthcare is strictly rationed only to those who can show proof of health insurance payments.

On the other hand the list of negatives was also long. One can note that some concerns are shared with the general British public. First of all respondents noted local variation in standards between GP surgeries across London – from decrepit and with equipment “*as in 1940s film*” (Mariola) to state of the art:

“It is a matter of where one lives, in better areas there are better doctors, in worse areas there are ... I mean, I am not saying worse doctors, maybe they are also good, but the general state of it all, the appearance just terrifies you...”
(Mariola)

The second major issue concerned the waiting times at A&E departments, in particular in case of real emergencies whereby the respondents themselves or their children were left in pain or in major distress for hours until they received some attention. This was seen as unacceptable and unlikely to have happened in Polish hospitals. The long waiting lists to see specialist doctors or to perform diagnostic tests as well as the difficulties of obtaining such referrals from GPs were mentioned as another issue which bothered respondents. A number of respondents noted their concern about what they

called “*no thorough examinations*” (Krystyna) by GPs, especially when symptoms were not manifest. Wanda added that the drive to diagnose the patient’s condition by conducting comprehensive tests is “*not the order of the day*”.

Tomek who was himself a medical professional mentioned “*lack of consistency*” between GP surgeries with regards to charging for necessary occupational health certificates and tests. The lack of continuity of the same doctor in larger surgeries and the inconvenient hours for conducting tests were also mentioned. Moreover Joanna brought up the issue of hygiene, such as not washing hands by nurses vaccinating children.

Some participants who had serious health problems were not happy about certain aspects of their care in London hospitals. Their complaints included being given the inappropriate dosage of medication, contracting a hospital infection and having a faulty implant. The latter respondent was quite pessimistic about their ability to fight for compensation. One person was concerned about the lack of full information about who carried out the procedure to be able to form a clear picture of their situation. The conditions in some hospital wards and the quality of food also caused some concern. Alicja was “*surprised by the very short time of keeping a patient after an operation*”. Such a policy hit hardest the participants who simply had nowhere to go after discharge from hospital.

Thus whilst praising the NHS’s inclusiveness, professionalism in addressing complex health needs, free services and help with associated costs for those on low income, participants also raised concerns about the unevenness in standards of services available on the NHS, the long waiting times, some difficulties in obtaining referrals and other issues.

Dissatisfied? Who can afford non-engagement

Participants who upon reflection and evaluation of engagement with the British welfare state were dissatisfied with some aspects of public services may try and look for solutions to their housing, health and financial problems outside the formal British welfare state for instance by purchasing services on the market in Poland or in the UK. As discussed in Chapter 5.4 the availability of practical alternatives in Poland to satisfy one’s needs experienced in London is limited to looking for healthcare. However not all dissatisfied participants could afford to take advantage of this alternative.

The difference between resource-rich and resource-poor participants is best illustrated by an example of participants who grappled with health problems and were dissatisfied with some aspects of their NHS care. Beata was married and living with her husband in London. She was dissatisfied with care she had received during pregnancy and childbirth. Furthermore Beata complained that her long-term health condition was misdiagnosed and treated with wrong medication during her hospital stays in London. After such negative experiences she decided to go to Poland and since then remained “*under care of a doctor in Poland, I go there regularly*” (Beata). She continued to be registered with a GP in London but attended only to obtain medication prescribed by the Polish doctor and not to seek any consultation. Her bad experiences of the NHS alongside negative views of the schooling system were factors in the couple’s return to Poland:

“We observe the state of education here, (...) health service is the basis [podstawa], so we have concluded that we will be returning, we began to invest in Poland.” (Jarek)

At the time of re-contact their return has been completed. Beata once again mentioned “*deficiency [niewydolność] of English healthcare*” among the main reasons of leaving London. However this was just one of the factors which enabled them to move to Poland alongside “*favourable employment situation in Poland, beginning of building a house*”. The couple enjoyed robust support from family members in Poland who wanted to pass on their family business. Overall one can argue that Beata and Jarek had a greater choice between alternative courses of action due to the accumulation of social, economic and cultural capitals.

In contrast, participants with fewer resources were left with fewer choices. Two participants who were receiving ongoing care from the NHS had no medical insurance in Poland and no funds to be able to buy a specialist medical care privately. Even if they had some doubts about the quality of care they received in London, in the absence of financial resources, established connections with doctors, and overall weak family support in Poland, their choice was limited to the option ‘to stay’:

“If I went to Poland and what if something happened there, where would I go? Should I go to Warsaw or should I go to my small town and look for a consultant privately? But privately, for sure, one would not examine me, one would have to take me somewhere to the hospital (...) And so, why would I go? How will I return later? So this somewhat keeps me here.” (Zygmunt)

“In principle, for now, the return to Poland is excluded, because we have nothing to return with and for ((laughter))... We have to hold on here. After all, I have the medical care here, whatever it may be...” (Alicja)

Both Zygmunt and Alicja were still in London at the time of re-contact. Their examples illustrate the difficulty of exercising ‘choice’ when it comes to public goods and services. Only those with sufficient resources of time, money, knowledge and connections are able to do this.

The presence of dissatisfied participants looking for alternatives indicates that engagement with the welfare state is a matter of a degree rather than of an outright embracement or rejection. Some participants opted for engagement only with certain aspects of host welfare state, for instance by preferring Housing Benefit option to applying for social housing or topping up British public healthcare with privately purchased one. Thus participants often combined the formal welfare services with the alternative welfare solutions purchased on the market or delivered through social networks.

The presence of dissatisfied participants exposed ongoing flows between engagement and non-engagement. Participants’ engagement and non-engagement are partly the outcomes of reflexive assessment of what is best and what is possible in a particular situation. Thus participants’ experiences may also have a feedback effect inducing a shift in the way of thinking such as the shift from a logic of engagement to the market logic of non-engagement in the case of dissatisfied NHS patients. Thus the analysed logics of engagement and non-engagement may partly represent post hoc rationalisations of calculated actions undertaken by individuals facing given structural constraints. The latter conclusion is consistent with the sequential interplay between agency and structure discussed at the beginning of this chapter.

5.7 Consequences of engagement for the agent

Benefits and costs of engagement

Participants’ evaluations offer a summary of the perceived benefits and costs of engagement with the British welfare state. On the plus side one can include the safety net protecting from risks such as illnesses or unemployment and cushioning the impact of ageing. Welfare benefits enabled some participants a tangible leap in living standards and improved their housing situation. Benefits directed to children offered a saving fund for their future. Similarly a secure social tenancy ensured a stable, affordable long-term

housing, a place which one could call ‘home’. Finally NHS healthcare was affordable and potentially life saving.

However, the take-up of social rights also entailed some costs to an individual. This included the fiscal costs but also the wider burden of contractual obligations and bureaucratic regulations which restricted the migrant worker’s autonomy and super-mobility. Furthermore, a greater docility and acceptance of the public gaze in the private sphere was expected in return. Moreover the mechanisms inherent in some social policy solutions produced some unintended consequences such as benefit or poverty traps characterised by disincentives to return to the world of low paid work and/or to save. The take-up of social rights thus led to an increased dependency on the welfare state and in case of non-working women also in an increased dependency on their partners (see Figure 7).

In light of such costs, some participants perceived the host social citizenship as more of a burden than a benefit. They preferred to remain outside of the welfare system and were prepared to privatise any risks associated with the market game, tempted by the prospects of greater rewards.

Figure 7. (2007/08 London study) Individual benefits and costs of engagement with the British welfare system

Engagement with the British welfare state (welfare benefits, social housing, healthcare)	
Benefits	Costs
<ul style="list-style-type: none"> ▪ basic safety net preventing destitution ▪ leap in living standards ▪ improved housing situation ▪ affordable and stable accommodation ▪ potential investment in children’s future ▪ long-term safety and security ▪ free healthcare, potentially life saving 	<ul style="list-style-type: none"> ▪ fiscal costs ▪ acceptance of contractual and legal obligations ▪ loss of adaptability, flexibility and super-mobility of a market player ▪ greater public gaze into private life ▪ demand of docility ▪ disincentive to work ▪ disincentive to save ▪ increased dependency on state ▪ non-working women’s increased dependency on working partners

Source: Interviews with Polish migrants in London (2007/2008).

Thus one can observe that upon engagement, in the long-term the host state’s social citizenship becomes more than just a means of satisfying one’s immediate welfare needs. It becomes a condition which begins to impact individual and family life chances. The positive aspect of this condition is the gradual inclusion into the new welfare community, which is accompanied with a build-up of a sense of membership

and social ownership, a sense of “*subscription*” to this country that participants were talking about. However the negative aspect is that from now on the systemic deficiencies of the welfare system such as scarcity of public goods, discrimination or low quality of services will have a direct impact on the individual’s opportunities and wellbeing.

Often women were first to experience such a double-edged effect of the welfare system. Although female participants were enthusiastic about the advantages of the top-up benefits such as tax credits they also noted their unintended subjugation to the domestic sphere. Similarly, single mothers appreciated the British state’s understanding of the difficulties they face as single parents. Sabina praised authorities’ interest in the fact “*that I have a child and I am alone [sama]*”. This also raised their paternalistic expectations hoping that once “*they take one under their wing*” (Marzena) one is not left without support in the future. However paradoxically the bigger their dependency on the state, the greater was their anxiety about losing the cushioning effect it provides:

“I am afraid that at some point they will tell us ‘stop’. That English state will seize it and (...) stop benefits for example to ... to ... non-English, and in such a case my rationale [racja bytu] here ... if I had to go to work and cope here on my own, alone, it will be hard for me, probably just as hard as in Poland (...) this would not be the same life as we have now.” (Marzena)

Thus the social rights, traditionally seen as providing a safety net, cannot eliminate the existential anxiety and do away with uncertainty in people’s lives but merely replace them with a different kind of worries this time about the whim of the state itself. This is because the more one engages with the system, the more one loses one’s independence from the system and becomes churned by its internal motions, be it the welfare state or the market. This fundamental and paradoxical quality of agency, the tendency for a social actor to be superseded by the social system once the tension between the ideal and the actual is resolved in one way or another, is the main argument of Dawe’s (1978) critique of agency theories discussed in Chapter 2.

The impact of engagement on (im)mobility planning

I have argued that non-engagement increases the ability to be super-mobile in pursuit of better opportunities on the labour market or better goods and services as consumers. However the question remains how engagement with the host welfare state impacts the mobility strategies. The ‘insider advantages’ perspective predicts that the take-up of social citizenship in the host country promotes immobility as immigrants are reluctant

to forego newly acquired social entitlements (Fischer, et al. 1997: 81-83). One can argue that the impact of the take-up of social rights is more complex as one has to take into account both the satisfaction with social entitlements and migrant's personal resources. Arguably Lee's push pull model is more appropriate for assessing the impact of social citizenship as a migratory factor. According to Lee (1966) the same factor can be assessed differently by different people. As this study found, participants who evaluated certain public services negatively were willing to forego them and look for alternatives. Yet they also had sufficient resources to act on these negative evaluations, "to overcome the intervening sets of obstacles" (Lee 1966: 56), to exercise the choice, otherwise they had to accept the status quo.

Arguably in most cases, rather than keeping participants immobile and settled, the host social citizenship played a more mediating role in their mobility planning. As the status of social citizens and reliance on support fluctuates over an individual's lifecourse, participants were taking into account such milestones as reaching the school age, finishing secondary education or reaching the pension age in their further mobility strategies. Several participants such as Karolina, Marzena or Kazik were reluctant to leave the UK for the time being as this would disrupt their children's education:

"My son, he is fifteen now, I can't now uproot him from here and take him to Poland, I will destroy his life completely, as nowhere nothing, he won't finish anything in Poland and neither here, and he won't achieve anything in life, so he has to get education here" (Marzena)

Kazik planned to take the decision "*whether to stay for good or to leave*" in two years time, when his child will be seven which is the age at which Polish children ought to start primary school:

"In two years time one will have to decide. Again it is about the child. As if we stay, then I can't throw him back to Poland, when he is 8 or 10, when it will be difficult for him to acclimatise back. And if I decide to throw him back, then with a view (to stay) there till the end, we stay in Poland for the next 10 years, any moves are out of the question." (Kazik)

Marek, in his 50s, worked in Poland, France and the UK and has decided "*to last here until the retirement.*" He did not plan any mobility until he reaches retirement age in the UK. Marek was hoping to collect the records of his contributions from all three countries in which he worked and take advantage of pension aggregation right within

the EU.¹⁶⁰ Also Andrzej who came to London before EU enlargement did not want to jeopardise his pension entitlements by risking further mobility:

“I had the working years [staż] counted here. Everything was already, so I couldn't leave it (...) Well, how? To throw it all and later... and in Poland there is no pension (yet), there is nothing, and what? Poverty.” (Andrzej)

Thus participants overall recognised the risks associated with repeated mobility, a “*vagabondage [tulaćka]*” (Franek) from country to country in search of work opportunities which may disrupt the contribution record and complicate pension entitlements.

Interestingly this study found no indication that participants strategised their mobility decisions around the vesting periods for EU migrants' social rights acquisition and strengthening. Three months, one year and five years thresholds of stay and work in Britain represent certain milestones on the timeline of an EU migrant's social citizenship in Britain (see Chapter 4). However participants did not emphasise these thresholds in their mobility planning. Arguably this was because their impact on the British social rights' portfolio of an EU migrant is complex and participants were not entirely clear about it. Secondly, one can argue that they are less consequential for an EU migrant's social rights in a host member state than similar vesting periods for migrants who do not enjoy the protection of EU citizenship.

Finally one should note that participants did not consider their host social citizen's status in isolation but among other factors and rarely articulated it as either a pulling or a pushing factor determining mobility plans. For example Mariola and Dawid, when asked whether the receipt of tax credits and other benefits will impact their mobility decision maintained that “*it will not be a determinant [wyznacznik] of whether to return or not to return*” (Mariola). Their decision will be primarily based on their ability to manage financially as a family in Poland, in which case the foregoing of British welfare benefits will seem irrelevant.

The presence of other pulling factors may simply override the pushing effect of the host social citizenship in case of dissatisfied participants as Michał explains:

“There will always be something that one will not like. Take for example this health service which is not at such a level to which we are used to. (...) There

¹⁶⁰ Although it is possible to aggregate the periods of contributions from different EU countries and receive a pro rata pension from each country, the complications remain in terms of lack of harmonisation of pension age, the impact of exchange rates, bank charges, and pension adjustments for inflation, to name but a few issues (EC 2005; Holzmann, et al. 2005).

are some things which I don't like here, which I don't agree with, but the majority simply tips the scales, the positive aspects simply outweigh (the negative)." (Michał)

One cannot ignore that with a prolonged duration of stay in the UK some participants may begin to develop emotive attachments to their place of residence purely as a result of leading a relatively comfortable existence. Such emerging identifications and a sense of membership in the host welfare community may make some participants more willing to 'forgive' the negative aspects of public services and accept them with all their virtues and faults. Karolina and her family did not contemplate the return in the nearest future:

"Because generally I think that we live rather well. We don't have any reason to complain. I think that we began to like this place in some way." (Karolina)

All in all, migration decision making is to a large extent a latent reflection process involving evaluations, probabilities of goal attainment and affections, which takes place within the constraints of bounded rationality. One can argue that individuals weigh a multitude of factors not in a computational manner but as a gradual reflection process based on lived experience, which often remains not verbalised.

5.8 Summary

This chapter offered an analysis of the rich interview narratives outlining the circumstances under which a sample of Polish migrants living in London came into contact with selected institutions of the British welfare state. Both the reasons behind the recourse to social rights in Britain and the ways of accessing welfare support have been analysed. In particular the participants offered the normative arguments for choosing to engage with the host welfare state institutions and legitimating such choices. Experiencing needs was deemed an inadequate moral basis for accessing welfare benefits and social housing in Britain. In contrast an elaborate, multifaceted logic of desert and to a lesser extent of local and supranational memberships underpinned participants' roles in Britain as social citizens.

Due to the lack of self-positioning as social citizens in Britain some participants looked outside the host social citizenship framework for satisfaction of their welfare needs. In particular the logic of a market player did not fit easily with membership in a welfare community due to the costs of engagement. Similarly a predominant self-perception as an informal and often temporary carer, and the private sphere focus that it entailed, did

not provide an immediate impetus for engagement. Finally, having no clear view as to one's rationale of being in Britain did not attain to engagement with the welfare benefits system.

Yet the research also revealed that some participants changed their outlook during their stay in London. Some individuals re-evaluated their ways of thinking and acting in the light of new circumstances. For instance upon arrival of family members some undocumented workers decided to regularise and engage with the welfare state as social citizens. Some older participants, who as informal carers functioned largely in the private realm of a household, gradually began to build attachments with the local public sphere. These examples suggest a fluid rather than fixed and permanent nature of the identified logics.

Interactions with the benefits and housing providers were affected by the conditionality of one's entitlements on economic activity, as outlined in EU policies on freedom of movement. In contrast the NHS turned out to be the most accessible and inclusive area of the welfare state, going well beyond the protection offered to EU migrants by EU citizenship. Those able to satisfy the eligibility criteria began to notice the welfare system's advantages and disadvantages, not least the agency constraining effect of engagement with the welfare state. Although many participants described their contacts with welfare providers as friendly and smooth, no doubt aided by their knowledge of English, a few came across the reluctance to recognise their social entitlements. It seems that whilst participants' engagement with the labour market was encouraged, for instance by employers' toleration and in several cases even promotion of undocumented employment, their engagement with British social citizenship stumbled across the problem of inclusion into the community of citizens of equal worth. If one accepts that social citizenship is a way of achieving the legitimacy of the social order or "civic integration" (Lockwood 1999: 64), any deficits of engagement and recognition as social citizens lead to the cumulative exclusion of individuals and groups.

Finally, the interviews suggest that the host social entitlements had no place among the motives initiating the move. Inevitably they begin to feature somewhat in participants' livelihoods in Britain. However the extent to which the social entitlements become salient depends on the accessibility, relevance and evaluation of a particular area of social citizenship for a particular individual or a family. Furthermore in most cases the preferences of family members or labour market prospects outweigh the host social citizenship in considerations of whether to return, to stay put or to divert to another

country. This is despite the fact that migrants forego the bulk of host social rights upon leaving the UK. In this study access to host social rights had an immobilising effect only in the case of participants with the least personal resources and the greatest needs who relied on the British healthcare system. The host social citizenship status, due to its links with the lifecourse stage, may have some impact upon the timing of future mobility.

Chapter 6. Conclusions: an agentic perspective on citizenship and mobility

The explored narratives uncover a plethora of social actions which participants engaged in upon arrival to the UK. These actions were influenced by a range of factors such as individual attitudes and resources, as well as structural opportunities and emplacement in the global city context. For these reasons the generalisation of Polish migrants' agency with respect to satisfying welfare needs remains qualified. Nevertheless one can discern certain social patterns and this final chapter offers a reflection on the conclusions and wider implications of this research.

6.1 Empirical findings in a comparative perspective

The policy analysis demonstrated that access to British welfare benefits and social housing depends on a continuous engagement with the British labour market, at least in the first five years of residence in a capacity of an EU citizen. Thus the current set-up of EU social policies in conjunction with the transitional arrangements introduced by the UK tends to exclude Polish migrants with 'patchy' occupational histories from benefits and housing entitlements in the UK. The link between social entitlements and economic activity is not essential only in the case of access to the British healthcare system, which is a universal, free service based on need, available to all lawful UK residents. Arguably, the foundational principles of the British NHS are more generous in this respect than the EU provisions.

The 2007/08 LFS statistics indicated the lower take-up of welfare benefits and social housing by Polish migrants compared with UK citizens. The most commonly claimed benefits were those available to low income, working persons and families, which is consistent with the existing policy constraints. However as Polish migrants age and acquire permanent residence status one can expect that this collective picture will begin to resemble the scale and profile of benefits claimed by the 'old' EU countries' citizens residing in the UK and by the UK citizens themselves.

Polish migrants' engagement with the British welfare state is influenced not only by structural conditions, but also by individual preferences and decisions on whether to make use of available social rights or not. The interviews showed that participants satisfied their welfare needs both within and outside of the British welfare state. The

reasons behind the chosen course of action were varied and depended in part on their self-positioning in British society either as market players, informal carers or social citizens. Seeing oneself in the role of a contributing social citizen in Britain not only promoted engagement with the welfare state institutions, but also served as a narrative legitimating access to British social rights. Although most participants arrived with an agenda of improving their own and their families' economic situation through participation in the British labour market, with the prolongation of their stay, some of them began to realise the drawbacks of solely a labour market focus. Thus especially those participants who had family members in the UK turned to various top-up benefits to mitigate the high costs of living in London. At the same time the take-up of social rights resulted in an awareness of a greater dependency of their individual welfare and wellbeing on the British welfare system.

One can note that the majority of participants had extensive civic competencies, showed civic assertiveness, integrity and an understanding of their rights and duties. They were keen to take part, contribute into and identify with British society, albeit on their own terms as autonomous individuals with a distinct cultural heritage. Overall the construct of social citizenship, which emerges from the interviews, is rooted in the contractual understanding of social entitlements, particularly in the salience of the work ethic and respect for the law, and in a multifaceted idea of a good citizen, which stretches beyond contractual relationships.

One can ask how this construct compares with the attitudes of the general Polish and British populations. Despite the lack of appropriate comparative and longitudinal data one is tempted to offer a few hypotheses in this respect. One can note that Polish migrants are a distinctive group in that their views on social citizenship in some aspects differ from the views held by both Polish and British general populations, whilst in other aspects correspond with them.

Studies suggest that the Polish general public has strong expectations towards the Polish state as far as ensuring a minimum standard of living for everyone (Marshall, et al. 1999: 356; WVS 2005-2008).¹⁶¹ At the same time there is a high level of support for the principle of desert in Poland (Marshall, et al. 1999). One can hypothesise that the views of participants diverge in that they have lower welfare expectations towards the Polish

¹⁶¹ In 1991/92 nearly 90% of Polish respondents agreed that Polish government ought to ensure the minimum standard of living for everyone (Marshall, et al. 1999). In 2005 35% of Polish respondents agreed that government should take more responsibility to ensure that everyone is provided for (the percentages represent the sum of the first three points on a ten-point scale) (WVS 2005-2008).

state. Participants' strong attachment to a desert criterion of social redistribution, the focus on the labour market, and the sheer fact that they moved in order to try and improve their situation, rather than raise stronger claims towards the home state, suggest that migrants may be more entrepreneurial, commodified and self-reliant than the general Polish population.

British qualitative studies suggest that British welfare users give great weight to contributory and conditionality principles of accessing social rights, whilst maintaining that the British state "should be extensively involved in the provision of welfare" (Dwyer 2000: 204). A universal principle and a social assistance principle are invoked mainly in the context of healthcare (Dwyer 2000: 201-203).¹⁶² The general British public tends to replicate such views overwhelmingly agreeing that the British state has an obligation to ensure minimum living standards for British citizens (Marshall, et al. 1999), but at the same time stressing individual responsibility for pursuing existing opportunities and accepting private top-up of health or education services by better-off people, provided they remain taxpayers (Taylor-Gooby and Martin 2010). Polish participants in this study voiced a similar ranking of principles according to which redistribution ought to proceed, favouring the criterion of an individualised desert. However they did not raise unequivocal welfare claims towards the British state, but made them contingent on the state's willingness and capacity to uphold them. Arguably this represents one of the crucial divergences of participants' construction of social citizenship from the Marshallian model. As Polish migrants occupy an ambiguous position vis-à-vis both host and home welfare communities, characterised only by a partial membership in both, one can hypothesise that their welfare claims against both states are not as definite as those put forward by the respective settled populations.

Apart from this divergence one can note more commonalities than differences between British mainstream and Polish migrants' views. Even the lack of a communitarian theme in the Polish participants' views on conditionality of social rights can be interpreted as a commonality. For instance Dwyer (2000: 203-204) argues that the communitarian references made by British respondents are better understood on the grounds of a liberal conception of citizenship rooted in the contractual relationships and

¹⁶² The contributory principle stresses the contractual, 'quid pro quo' relationship between an individual and the state, whilst the conditionality principle predicates social entitlements on fulfilling certain responsibilities towards one's community such as obeying the law and behaving in an appropriate manner. The universal principle assumes an equal unconditional access for all, and the social assistance denotes selective, means-tested assistance to those experiencing the greatest need (Dwyer 2000).

individualised rights and obligations rather than in some form of collective identification. Even though Polish migrants claimed that they do not want British citizenship and do not feel British, if one assumes that Britishness is a “loose and fuzzy” civic identity rooted in liberal values (McCrone and Kiely 2000: 32), one can argue that by subscribing to the individualised, contractual version of citizenship, Polish migrants living in Britain engaged themselves with this pseudo-communitarian thinking in much the same way as British respondents.

6.2 Theoretical implications

The theoretical implications expose the extent of the fit between Polish participants’ views on citizenship and redistribution, and the premises of the Marshallian model. In this respect a number of important divergences can be observed. Firstly, as Polish participants come from a social context with no legacy of welfare capitalism, they were not familiar with the role that social rights play alongside other citizens’ rights. Thus their social citizenship construct emerges entirely on the basis of their experiences of the British welfare system, which since its inception has undergone a notable shift towards neoliberalism.

Secondly, geographical mobility exposes the dissonances between conflated notions of welfare solidarity and national identity embedded within the Marshallian citizenship framework. The participants suggest that one can construe a sense of belonging to the welfare community on the basis of non-national allegiances, whilst maintaining a national identity anchored in the home country. In particular, the non-national identifications can be based on contractual and local ties, which cut across ethnic boundaries.

As if in order to recompense for the lack of shared national identity, participants construed their sense of belonging to the British welfare community on the principle of desert, calling for “proportionality between contributions and rewards (or inputs and outputs)” (Marshall, et al. 1999: 349). They tended to stress their contributions to the common good by working and obeying the law, thereby pointing out that both individually and collectively Polish migrants fulfil two fundamental duties of a citizen, which accompanied the notion of citizenship throughout its evolution since antiquity (Trzeciński 2006). Participants perceived their contributions through working and obeying the law as their part of a contractual arrangement, which in turn paves the way for social entitlements. The attachment to the contributory and conditionality principles

delineates the boundaries of the welfare community in an unconventional way, legitimating exclusions of ethnic in-group and out-group members who are perceived as not contributing sufficiently.

Furthermore, the acute legal consciousness of some participants emphasising that they live and work in the UK legally and that they are law-abiding, fully submitting to the British law and hesitant to criticise it, signals the links between social rights and civil rights. Marshall (1950: 10) notes that civil rights represent the rule of law which is “necessary for individual freedom”. One can argue that by stressing their law-abiding disposition, participants attempted to draw subtle parallels between the principles governing social and criminal justice. Respecting the law means acting in a way which does not endanger the liberties of others. In contrast, those who disobey the law, for instance by committing a crime, violate the rights of others and thus effectively undermine the civic equilibrium, even though they may share national identity with the law-abiding citizens. In other words the law-abiding argument is an attempt to inject moral legitimacy into one’s recourse to public goods in the absence of other strong grounds for inclusion, such as shared national identity or past injustices.

Although participants did not directly link their local attachments with claims to social rights, unlike in the case of working and obeying the law, their local allegiances to places of residence formed an important part of a good citizen’s persona. It is through the ideal of a good citizen, to which participants aspired, that their local identifications legitimated recourse to social rights in Britain. This is not surprising as many of the qualities of a good citizen receive clear instantiations in a local community, where boundaries are more physical, consequences of one’s actions immediately visible, duties more tangible, and inclusion criteria more corporeal.¹⁶³ Notwithstanding the conflict and competition over resources, there are some clear common interests such as the maintenance of a pleasant living environment or crime prevention, which all residents share.

Finally, it is worth mentioning a somewhat different construct of citizenship communicated by gay and lesbian participants. One can speculate that the fact that the civil rights of homosexual persons are guaranteed in the UK and that they enjoy public recognition of their identities – “a third form of liberty” (Isin and Wood 1999: 32) –

¹⁶³ Yet such qualities do not make a local community, or indeed any other community forged on the basis of non-national identifications, any less ‘imaginary’ or ‘imagined’. To paraphrase Balibar (1991: 93) all communities are imaginary and “*only* imaginary communities are real”.

made gay and lesbian participants more at ease in making use of all citizenship rights. In other words there might be a potential overspill of the group rights into creating a more competent and confident citizen. It is psychologically plausible that a person who receives public recognition for who she or he is, gains confidence in both public and private life.¹⁶⁴

At first glance the attachment to conditionality of welfare and non-national identifications seems to indicate a divergence from the universalism and (nation) statism of Marshallian social citizenship. Yet on the other hand Marshall (1950: 78) in his most famous essay stressed the importance of duties of citizenship, “the general obligation to live the life of a good citizen”. Moreover he was aware of the importance of fostering “more limited loyalties”, especially to the local community and professional group, as he doubted that a large, abstract and thus distant national community can be “a continual driving force” in keeping the civic spirit alive (Marshall 1950: 80). Furthermore, and this is something which often goes unnoticed, Marshall anticipated the debate around group rights to recognition (Isin and Wood 1999: 31-32). In his “Reflections on Power” written in 1969 Marshall (1981: 142) pointed out that civil rights are crucial for the practice of citizenship as they are the only type of rights that is “a form of power” available to the citizens. He illustrated his argument by analysing the Black Power movement in the US and other identity-based social movements struggling for recognition as a social group and for the transformation of the whole society rather than merely gaining more political or social rights in an existing consensus.

Thus the overall assessment of the scale of divergence of participants’ views from the Marshallian paradigm depends considerably on the preferred interpretation of the ambivalent Marshallian stance. Even if the Marshallian model of social citizenship is interpreted as out of sync with the prevailing social attitudes towards the redistribution of collective wealth, arguably social rights retain their critical ‘enabling’ function in light of the periodical failures of free market mechanisms and no presently viable alternatives.

6.3 Policy implications

The theoretical perspective endorsed in this thesis and the empirical findings suggest a number of policy implications, which diverge considerably from current practice. For

¹⁶⁴ On the other hand the effect of greater civic awareness may also be connected with the fact that all gay and lesbian interviewees were well-educated individuals.

instance, this study showed that participants were civically engaged in their local communities through everyday life activities regardless of their formal citizenship status, proficiency in English or length of stay. Yet despite emerging claims to membership on non-national grounds, formal membership in a nation-state certified by a passport remains the main criterion of inclusion in and exclusion from a particular welfare community. Furthermore, policy documents capturing the official British discourse on citizenship seem to doubt the civic competences of immigrants, downplay the agentic character of citizenship, and stick to the nation-state version of citizenship conflating civic and national identities. The citizenship review undertaken by Lord Goldsmith QC (2008: 9) recommends a top-down checklist of citizenship practices, “a credits-based system” designed to measure “a person’s commitment to living in the UK and engaging with UK society”. This effectively means that it is up to the government to decide which “certified activities” constitute citizenship practices and which do not (Goldsmith 2008: 117). In 2009 these premises were followed up in the Borders, Citizenship and Immigration Act introducing an “activity condition”, for example a period of formal volunteering in a pre-approved organisation, for those wanting to speed up their acquisition of British citizenship (see Appendix 11).

Arguably, such an immigration policy subjects outsiders to the contradictory pressures to ‘integrate’ by fulfilling government approved conditions and at the same time to stay away from the public goods until such ‘integration’ has been achieved and certified by state bureaucrats. Balibar (2004: 171) notes similar simultaneous contradictory forces affecting immigrants who face “exclusion from citizenship but inclusion in the economy”. However if one accepts that partaking in a host social citizenship is a precondition rather than the outcome of societal integration, then to remain outside of the social citizenship framework, either by coercion (due to the imposed restrictions) or by choice (as in following market player’s inclinations), leads to social exclusion.

One can argue that such a policy direction shows little understanding of or regard for immigrants’ subjective construct of citizenship and bottom-up localised citizenship practices. Also it exposes the chasm between the sociological and political/legalistic definition of citizenship (as discussed in Chapter 2), which have radically different policy implications. The implication of viewing citizenship not only as a set of norms and legal regulations, but also as a social practice is an acceptance of the fact that a sense of citizenship cannot be manufactured or enforced top-down. In that sense citizenship is akin to migrant integration which “can be achieved only as a *side effect* of

actions undertaken for different purposes” (Sayad 2004: 223). One can argue that citizenship thrives as long as the bottom-up actions and initiatives linking residents in a web of informal and formal reciprocal relationships are freely undertaken.

One can argue that policy makers should find more ways to factor in grassroots allegiances, including a greater recognition of local, contractual, socioeconomic, and primary identifications in an effort to disentangle the conflation between citizenship and national identity. On the other hand one can question why such a policy direction ought to be pursued by the host majorities, especially if they perceive it as not in their own interest. Although there is no unequivocal answer to this question, one can argue following Mouffe (2000) that it is important to include in the constituency of decision makers all people who are affected by those decisions as a precondition of democracy. Thus the tension between the principles of liberty and equality, which lies at the heart of “democratic paradox”, is not seen as something to be overcome by a one-sided solution, but as “the very condition of possibility for a pluralist form of human coexistence in which rights can exist *and* be exercised” (Mouffe 2000: 10-11). Bearing in mind that we live in a world in which “individuals and groups can neither separate nor get along at will” (Balibar 2004: 173), inclusion of all residents in a public discourse leads, in my opinion, to a better life for all.

If this does not sound convincing enough, it remains a possibility that in many respects immigrants and natives share the same views on many issues, for instance on conditionality of welfare and on the importance of labour market position in fulfilling one’s welfare aspirations (Timonen and Doyle 2009). Thus immigrants’ views cannot be ignored as they form a part of popular sovereignty. Instead policy efforts should be directed at exposing similarities in opinions, where they exist, dispelling myths about a perceived lack of contributions to the common good by certain social groups, creating structural opportunities, and removing existing barriers for participation in the labour market and other spheres of social life, which are seen as socially valued.

Given the readiness to accept the need for a greater inclusion of immigrants into host citizenship as equal partners, a number of more specific policy implications follow. For instance, as it takes time for newcomers to learn and adapt to the host policy framework, it is important to provide migrants with better information about their rights, including doing so in their native language, so the consequences of utilising and not utilising those rights become clearer to an individual. Finally, it is worth mentioning that out of the three areas of the welfare state taken into account, the National Health Service appears

to be guided by the most inclusive principles. It stands out as most in tune with the normative views that healthcare should be available to all people in need.

The findings also test the limits of EU social policies. As far as freedom of movement provisions within the EU are concerned, migrant workers enjoy a privileged position regarding the scope of social rights in the host member states and the portability of some social entitlements, whilst other categories of mobile Europeans experience deficits in formal social rights in both host and home states. One can argue that the highly insecure social citizenship status of the most disadvantaged migrants with limited personal resources puts them in danger of becoming “vagabonds” – people who are welcome nowhere (Bauman 1998: 92). The fact that such a differentiation exists within EU citizenry, let alone one separating EU and non-EU citizens, reconfirms that EU citizenship is a highly exclusionary and unequal status (Balibar 2004; Dwyer 2004).

Overall the research showed that Polish citizens engaged in intra-European mobility have complex and nuanced views on organisation of social rights within EU which in some aspects diverge from official policies. Whilst stressing that remaining in the ‘union’ entails a duty of reciprocity, participants also pointed out that the balance between rights and duties has to be carefully negotiated, in order to retain popular endorsement.¹⁶⁵ The findings suggest that at least some of the existing privileges that EU migrant workers enjoy, such as the portability of family benefits within the EU, may lack popular legitimacy in some circumstances.

Participants communicated a multilayered construct of civic belonging comprising clear identifications with local communities in Britain and national identifications with the Polish nation and society. Arguably against this backdrop, European belonging was perceived more as a statement of juridical or geographical fact rather than a type of identity. As Balibar (2004: 9) notes European identity remains a necessity, but at the same time an impossibility due to the lack of European social movements and authoritarian rules of inclusion in and exclusion from membership in Europe. Some scholars link the lack of pan-European identification with member states’ continuing attachment to the nation-state doctrine. As Schierup and colleagues (2006: 258) argue the EU suffers from “a surplus of ethnos and a deficit of demos”. Given the strength of the nation-state conception within the EU and the disenchantment of citizens with

¹⁶⁵ Although the views on the reciprocal obligations within EU had supranational, ‘cosmopolitan’ undertones, they had no bearing on participants’ engagement practices with the British welfare state, which were set out mostly with bounded national welfare states in mind.

political rights at the EU and national levels, it remains unclear whether in the long run EU migrants' practices will redefine European citizenship from below and give rise to a substantiated European identity.

6.4 Further research agenda

This research showed that Polish migrants in Britain are characterised by a mix of allegiances and attitudes which coincide in some respects and differ in other with the views held by the respective home and host populations. Arguably this is the first empirical study showing how the host social citizenship framework captures Polish economic migrants who had no plans to engage and turns them into social citizens who care about their place of residence. The findings show how local identifications emerge and thrive among migrants who do not want (or need) to become national citizens of the host state. In that sense this study exposed genuine, grassroots adaptation processes of mobile agents for whom the naturalisation trajectory is not critical.

One can note that further research utilising both qualitative and quantitative methods is needed. In particular a number of hypotheses hinted at by this qualitative, sensitising study would benefit from testing on systematic, large-scale quantitative data. These include the suggestions that different ethnic groups living together share a similar sense of normative principles regarding redistribution; emigrants have weaker redistributive expectations towards their home states than the settled population; people tend to support less conditional principles of redistribution of healthcare; individual's normative views have an impact on their take-up of citizenship rights; immigrants' non-engagement with the host social citizenship receives greater recognition from host population than their engagement; European identifications are lacking in comparison with other sources of non-national identifications. Arguably pursuing these areas of research will flesh out some points of discontent as well as highlighting common ground between mobile and settled populations of both home and host countries.

The ultimate aim of this study was not a monograph on a particular migrant group and not even a detailed map of Polish migrants' welfare views and needs. Instead the aim was to uncover some popular underpinnings of the constitution of modern collectivities in the context of complex and highly transient global cities such as London. Thus embracing a number of co-residing socioeconomic and ethnic groups in future research is crucial for understanding the social dynamics of such "super-diverse" places

(Vertovec 2007) and is a logical extension of the theoretical and methodological premises endorsed in this research.

Overall this study looked at how people involved in intra-European East-West mobility satisfy some of their basic needs of shelter, medical aid and adequate standard of living. Starting from this lowest level of abstraction, representing at the same time the highest survival imperatives, this thesis offered Polish citizens-migrants' perspectives on the principles and ways of living together as they are understood and enacted in everyday life.

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Appendices

Appendix 1. (2007/08 London study), Research leaflet

[Polish version]

Od migrantów do obywateli?

Prawa społeczne Polaków mieszkających w Londynie

Wersja Styczeń 2008

Zaproszenie do wzięcia udziału w badaniu socjologicznym:

Jestem doktorantką University College London i realizuję badanie socjologiczne dotyczące korzystania z obywatelskich praw społecznych przez Polaków, którzy przybyli na Wyspy Brytyjskie w okresie ostatnich 10 lat. Zebrane materiały posłużą do mojej pracy doktorskiej.

Poszukuję rozmówców do około 50 wywiadów pogłębionych. Wywiad jest rozmową, podczas której poruszone zostaną między innymi tematy sytuacji rodzinnej, planów migracyjnych oraz korzystania ze świadczeń publicznych i pomocy społecznej w Wielkiej Brytanii w zakresie służby zdrowia, mieszkalnictwa socjalnego, zasiłków i ulg podatkowych.

Zależy mi na dotarciu do Polaków, którzy znaleźli się w różnych sytuacjach rodzinnych po przyjeździe do Wielkiej Brytanii, do osób mających różne opinie (zarówno pozytywne jak i negatywne) oraz do korzystających ze świadczeń publicznych w różnym zakresie (zarówno minimalnym jak i w znacznym).

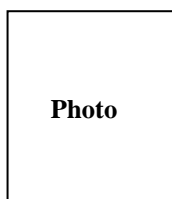
Wywiady są anonimowe, nagrywane na dyktafon (za zgodą), trwające mniej więcej godzinę i przeprowadzane w dogodnym dla Państwa miejscu i czasie. Ponadto chciałabym skontaktować się ponownie z niektórymi osobami w 2009 roku w celu zebrania informacji o aktualnym miejscu zamieszkania i podzielenia się wynikami badania. Uczestnictwo w tym badaniu jest całkowicie dobrowolne. Zachowuję również Państwo prawo do wycofania się w każdej chwili bez podawania powodu.

Anonimowość danych:

Informacje zebrane w trakcie tego projektu badawczego są traktowane jako poufne i anonimowe i nie będą nikomu przekazywane ani udostępniane. Wybrane cytaty z wywiadów mogą zostać wykorzystane w publikacjach akademickich, lecz w sposób gwarantujący zachowanie anonimowości rozmówców. Badanie to posiada akceptację uniwersyteckiego biura ds. ochrony danych (UCL Data Protection) i komitetu etyki badawczej (UCL Ethics).

Bardzo mi zależy na poznaniu Państwa opinii i doświadczeń.

Proszę o kontakt emailowy lub telefoniczny:



Dorota Osipovič

Email: ...

Tel. kom. (+44) ...

Adres:

Dorota Osipovič

PhD research student
UCL School of Slavonic and
East European Studies
University College London
Gower street
London WC1E 6BT

Dziękuję!

[English translation]

From Migrants to Citizens?

Social Rights' Take-up by Polish Migrants in London

Version January 2008

Invitation to take part in the research:

I am a PhD student at the University College London. I am investigating the take-up of social rights by Polish migrants, who came to the UK in the last 10 years. Data collected during this research will be used in my doctoral thesis.

I am looking for about 50 potential interviewees who would agree to take part in an in-depth interview. An in-depth interview is a face to face conversation which touches upon such issues as family situation, migration plans, experiences in accessing public services e.g. health care, schooling, education, housing etc. and welfare benefits in the UK.

I am very keen to reach Poles who found themselves in various family situations upon arrival to the UK; those who have different opinions (either positive or negative) and those who make an extensive or little use of public services.

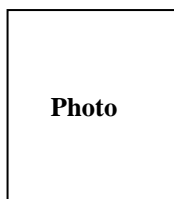
All interviews are anonymous, tape recorded and last about an hour. Interviews are conducted in the convenient time and place for an interviewee. In addition I would like to re-contact some respondents in 2009 in order to gather information about their current place of residence and to share the research results. Participation in this research is entirely voluntary and you have a right to withdraw at any time without giving any reason.

Data anonymity:

Data gathered during this research is confidential and anonymous and will not be passed to any third parties. Interview excerpts may be used in academic publications but will be used in the way that preserves the anonymity of respondents. This research project has an approval of UCL Data Protection office and UCL Research Ethics.

I am very interested in your views and experiences.

Please contact via email or telephone:



Dorota Osipovič

Email: ...

Tel. (+44) ...

Adres:

Dorota Osipovič

PhD research student

UCL School of Slavonic and
East European Studies

University College London

Gower street

London WC1E 6BT

Thank You!

Appendix 2. (2007/08 London study), In-depth interview schedule and post-interview form

[Polish version]

[wersja 08.04.2008]

Zgoda na udział:

- *czy ma ulotkę informacyjną? Jeśli nie, to dać*
- *wywiad potrwa ok. 1 godziny;*
- *może się wycofać w każdej chwili bez podawania powodu;*
- *nie musi odpowiadać na wszystkie pytania, może pozostawić pewne pytania bez odpowiedzi;*
- *Czy ma jakieś pytania zanim zaczniemy?*
- *Czy zgadza się na nagranie wywiadu?*
- *Czy mógłby potwierdzić, czy zgadza się wziąć udział w tym badaniu?*

I. Okoliczności przed przyjazdem do WB

Jak wyglądała Twoja osobista i zawodowa sytuacja w Polsce tuż przed przyjazdem do WB?

Dlaczego zdecydował się na wyjazd do Wielkiej Brytanii?

Jak długo planował zostać w WB na początku?

II. Pierwsze kroki w WB

Jak wyglądały pierwsze kroki w WB?

Kto okazał się lub co okazało się najbardziej pomocne w pierwszym okresie pobytu w WB? W jaki sposób?

Z czym miał największe trudności po przyjeździe do WB? (*Zalatwienie pracy, mieszkania itp.*)

Jak wyglądała pierwsza praca? Pierwsze mieszkanie?

Co głównie zdecydowało o tym, że zdecydował zostać w WB, że nie zrezygnował i nie wrócił do Polski?

III. Aktualna sytuacja w WB

Jakie zmiany zaszły w życiu osobistym i zawodowym od przyjazdu do WB?

Jaka jest obecna sytuacja zawodowa?

Jaka jest obecna sytuacja osobista?

Jak ocenia swój poziom angielskiego w tej chwili? Czy podczas kontaktów z instytucjami, urzędami korzystał kiedyś z usług tłumacza?

IV. Korzystanie ze świadczeń publicznych i pomocy społecznej w WB

(Jeśli ma małe dzieci) OPIEKA NAD DZIECKIEM

Kto pomaga w opiece nad dzieckiem?

Jak sobie ułożył plan dnia, pogodził to z pracą czy innymi obowiązkami?

Czy korzysta z pomocy krewnych, opiekunki, przedszkola?

OPIEKA ZDROWOTNA

Czy jest zarejestrowany u lekarza GP? Jeśli nie, to dlaczego nie jest?

Jeśli tak to, od kiedy jest zarejestrowany? W jakich okolicznościach zapisał się do GP tzn. czy był wtedy chory i miał potrzebę zwrócenia się do lekarza?

Czy miał jakieś problemy z zapisaniem się, czy musiał przedstawiać jakieś dokumenty co do swojego pobytu tutaj?

Jakie ma doświadczenia w korzystaniu z opieki medycznej w WB?

Skąd czerpie informacje na temat służby zdrowia tutaj?

MIESZKALNICTWO

Jaka jest aktualna sytuacja mieszkaniowa?

Z kim teraz mieszka? Jak układają się stosunki ze współlokatorami? Z głównym najemcą/landlordem?

Jak wygląda podział obowiązków domowych pomiędzy domownikami?

Jaki podział obowiązków uważa za idealny (również pomiędzy partnerami)?

Czy słyszał o tzw. mieszkaniach socjalnych?

Czy rozważał kiedykolwiek taką opcję? Czy orientuje się jakie są kryteria przydziału? Dlaczego tak/nie?

Jak się dowiedział, że może się ubiegać? Skąd posiada informacje na temat mieszkań socjalnych?

ZASIŁKI

Czy kiedykolwiek ubiegał się o państwowe zasiłki? (*Child Benefit, Child Tax Credit, Working Tax Credit, Council Benefit, Housing Benefit, Maternity Allowance, Income Support, Jobseeker's Allowance, Incapacity Benefit, Disability Allowance, Pension Credit itp.*)

Jeśli nie, to dlaczego nie?

Jeśli tak, to jak został potraktowany? Czy miał jakieś problemy?

Jak się dowiedział się, że może się ubiegać?

Kto pomagał mu w aplikowaniu o zasiłki, wypełnianiu formularzy? Jacyś pośrednicy, adwokaci, doradcy? Czy w grę wchodziła opłata pieniężna za poradę? Ile i komu?

Jak ocenia ogólnie nastawienie urzędników angielskich?

V. Źródła uprawnień społecznych w WB

Na ile przed przyjazdem do WB orientował się, jak działa system świadczeń i opieki społecznej tutaj?

A teraz czy bierze pod uwagę świadczenia społeczne, z jakich korzysta w WB rozważając decyzję o powrocie do Polski?

Jak sądzisz, czy Polacy są traktowani na równi z Anglikami czy raczej nie? (w dostępie do świadczeń w WB?, w pracy?)

Jakie są główne obowiązki Polaków wobec społeczeństwa brytyjskiego? / Do czego Polacy powinni się czuć zobligowani?

Jak sądzi, czy to, że prawo do zasiłków jest uzależnione od pracy i od przepracowania tutaj roku jest sprawiedliwe?

Kto ma pomagać Polakom, którzy zachorowali bądź ulegli wypadkowi i nie mogą pracować?

Kto ma zapewniać pomoc bezdomnym Polakom / Polakom, którzy znaleźli się w trudnej sytuacji w Londynie? Pod jakim warunkiem czy bezwarunkowo? Co sądzi na temat akcji powrotów organizowanych dla bezdomnych Polaków w Londynie przez organizacje charytatywne z Polski?

Co sądzi na temat takiej sytuacji, kiedy pobiera się zasiłek rodzinny w Wielkiej Brytanii, na dzieci które przebywają w Polsce?

Czy są Polacy, którzy, Twoim zdaniem, nie powinni być uprawnieni do zasiłków w WB? Komu pomoc państwa angielskiego nie powinna się należeć?

Jaki system świadczeń społecznych jest bardziej sprawiedliwy – uzależniony od tego, ile ktoś płacił składek czy też od potrzeb osoby, bez względu na to jej dotychczasowy wkład?

Jak ocenia swoją aktualną pozycję (materialną i zawodową) w WB w porównaniu z Brytyjczykami?

A w porównaniu z pozycją zajmowaną w Polsce przed wyjazdem?

A w porównaniu z pozycją innych Polaków pracujących w Londynie?

VI. Kontakty z PL i transnarodowe korzystanie ze świadczeń

Jak wyglądają teraz Pana kontakty z Polską?

Jak często jeździ do Polski? Z jakich świadczeń korzysta w Polsce przy okazji wizyt? (np. służba zdrowia)

Czy jest / byłby uprawniony do jakichś świadczeń i pomocy społecznej w Polsce gdyby wrócił?

Czy pobiera lub kiedykolwiek pobierał jakieś zasiłki w Polsce? (dla bezrobotnych, emerytury, dofinansowanie na mieszkanie itp)

Jak wygląda wzajemna pomoc w rodzinie? Czy mógłby liczyć na pomoc ze strony rodziny gdyby wrócił?

Czy oszczędza na emeryturę w jakiś sposób? W jakim kraju planuje pobierać świadczenia emerytalne?

VII. Plany migracyjne

Jak długo zamierza pozostać w WB teraz? Dlaczego?

Co by go skłoniło do powrotu do Polski?

Z perspektywy czasu, jak ocenia swoją decyzję o przyjeździe do WB?

Jak wyobraża sobie swoją sytuację za rok?

VIII. Identyfikacja / Tożsamość obywatelska

Z jaką grupą ludzi najbardziej się w tej chwili utożsamiasz?

Dlaczego akurat z tą grupą?

Jak układają się stosunki pomiędzy Polakami a innymi narodowościami w Twoim miejscu pracy / w sąsiedztwie?

Czy interesują Cię sprawy w okolicy, w której mieszkasz?

Czy interweniował kiedyś w sprawach lokalnych?

Czy weźmiesz udział w wyborach lokalnych? Dlaczego?

Czy śledzisz sytuację polityczną w WB? Czy czytasz gazety? Itp. Co najbardziej interesuje? Dlaczego nie?

Jak ma załatwione formalności związane ze statusem na rynku pracy i pobytem?

Czy posiada numer ubezpieczenia społecznego NINo?

Czy jest zarejestrowany w Worker Registration Scheme?

A z pobytem tutaj?

Czy ma status rezydenta (*residence permit*) / stały pobyt (*permanent residence*)?

Czy zamierza ubiegać się o obywatelstwo brytyjskie? Dlaczego tak/nie?

Na ile czujesz się częścią społeczeństwa brytyjskiego? W jakich sytuacjach?

Jak wejście Polski do UE wpłynęło na Twoją osobistą sytuację? Czy coś zawdzięczasz UE?

Jakbyś podsumował, co zyskujesz, a na czym tracisz w związku ze swoim pobytem za granicą?

Czego pobyt w Anglii Ciebie nauczył? Jak zmienił Twoje opinie?

Czy chciałby jeszcze coś dodać?

Metryczka

- Wiek: Płeć:
- Rok pierwszego przyjazdu do Londynu (*również na urlop/wakacje itp.*):
- Od kiedy przebywa „na stałe”, w celu zamieszkania na dłużej?:mscrok
- Wykształcenie:
- Stan cywilny aktualny (*legalny*):.....
- Stan cywilny w momencie przyjazdu do Londynu („na dłużej”):
- Dzieci (*ile, w jakim wieku, ur. w WB czy PL?*):.....
- Kto z bliskiej rodziny (partner, dzieci, rodzice, rodzeństwo) przyjechał do WB jako pierwszy i w którym roku?
.....Kto? w którym roku?
- Z kim zamieszkał w Londynie zaraz po przyjeździe na dłużej?
- Z kim mieszka w WB obecnie?: dokładnie ile osób łącznie z resp.?osób
(pokrewieństwo, narodowość, wiek, płeć, rok przyjazdu do WB)
- Dzielnica Londynu, w której mieszka obecnie
- Liczba pokoi (łącznie z living room)
- Status prawny mieszkania: (*wynajem osobiście/ podnajem / socjalne / z pracy*)
.....
- Ile razy się przeprowadzał od czasu przyjazdu do WB?
- Miejsce urodzenia w PL (*województwo lub duże miasto*):
- Miejsce zamieszkania w PL (*bezpośrednio przed przyjazdem do WB*):
- Z kim mieszkał(-a) w PL tuż przed wyjazdem do WB? (*liczba członków gosp dom i pokrewieństwa*):
.....
- Kto z bliskiej rodziny (*rodzice, małż., dzieci, rodzeństwo*) przebywa w PL obecnie
.....
- Doświadczenie zawodowe w PL (*gl. zawód wykonywany*):
- Doświadczenie zawodowe w WB (*gl. zawód wykonywany*):
- Status na rynku pracy w WB (*self-employed, full-time, part-time, bezrob, gospodyni dom*)
.....
- Czy zarejestrowany w WRS?: Tak / Nie / Nie ma wymogu, bo
Od kiedy?.....
Czy otrzymał registration certificate wydany po 12 miesiącach? Tak/ Nie / Nie wie nic o tym
- Czy posiada numer ubezpieczenia społecznego NINo? Tak/Nie od Kiedy?
Wydany w celach zatrudnienia / pobierania zasiłku
- Czy jest zarejestrowany w przychodni GP?: Tak / Nie Od kiedy?:
- Liczba i rodzaj zasiłków pobieranych w WB:.....
- Liczba i rodzaj zasiłków pobieranych w PL:.....

Ponowny kontakt

- Zgoda na ponowny kontakt w 2009 r.?TAK / NIE
- Preferowany sposób kontaktu: EMAIL / TELEFON / Adres LISTOWNY (w PL lub w WB)
- EMAIL: TELEFON kontaktowy: ADRES:.....

[version 08.04.2008]

Informed consent:

- *Whether respondent has research leaflet? If not, give;*
- *Interview will last about 1 hour;*
- *Respondent can withdraw at any time without giving a reason;*
- *Respondent may not answer all questions;*
- *Whether respondent has any questions before start?*
- *Whether respondent agrees to recording the interview?*
- *Ask to confirm whether respondent agrees to take part in this research?*

I. Circumstances before arrival to Great Britain (GB)

What was your personal and professional situation in Poland (PL) just before coming to GB?

Why have you decided to go to GB?

How long have you planned to stay in GB at the outset?

II. First steps in GB

How do you recall your first steps in GB?

Who or what was the most helpful during the initial period of stay in GB? In what way?

What did you find the hardest after arrival to GB? (*finding job, flat etc.*)

What was your first job? First flat?

What made you decide to stay in GB and not to return to Poland at that stage?

III. Current situation in GB

What changes occurred in your personal and professional life since arrival to GB?

What is your current employment situation?

What is your current personal situation?

How would you rate your level of English? Have you ever used an interpreter during contacts with various institutions here?

IV. Usage of public services and social assistance in GB

(*if has young children*) CHILDCARE

Who helps you with childcare?

What is your daily routine? How do you reconcile it with work and other duties?

Do you make use of help from relatives, nanny, nursery?

HEALTHCARE

Are you registered with a GP? If not, why not?

If yes, then since when? In which circumstances have you registered with a GP? (*being ill etc.*)

Have you had any problems with registering? Were you required to present any documents regarding your stay here?

What are your experiences of using healthcare in GB?

Where do you find information about healthcare system here?

HOUSING

What is your current housing situation?

Who do you live with? How would you describe your relationships with flatmates? With main tenant / landlord?

How do you share household chores?

What would be an ideal chores sharing arrangement? (including between partners)

Have you heard about so called council flats?

Have you ever considered this option? Why not/yes? Do you know what the allocation criteria are?

How did you find out about a possibility to apply? Where do you find information about social housing?

WELFARE BENEFITS

Have you ever applied for any state benefits? (*Child Benefit, Child Tax Credit, Working Tax Credit, Council Benefit, Housing Benefit, Maternity Allowance, Income Support, Jobseeker's Allowance, Incapacity Benefit, Disability Allowance, Pension Credit etc.*)

If not, why not?

If not, how have you been served? Did you come across any problems?

How did you find out that you can apply?

Who helped you with applying, with filling in forms? Any intermediaries, advocates, advisors? Have you had to pay? Whom and how much?

How would you assess overall attitude of English officers?

V. Sources of social entitlements in GB

What was the extent of your knowledge about the functioning of the system of public services here before arrival to GB?

Do you take into account social entitlements which you make use of in GB whilst pondering the decision to return to Poland?

In your opinion are Poles being treated on a par with English or not? (in accessing services, at work?)

What are the main duties of Poles with regard to British society? What should Poles feel obliged to?

In your opinion, whether conditioning the right to benefits on working here and on having worked a year is fair?

Who should help Poles who got ill or had an accident and can't work?

Who should help homeless Poles / Poles are in a difficult situation in London? Under what conditions or unconditionally? What do you think about returns organised for homeless Poles in London by charity organisations from Poland?

What do you think about claiming family benefit in GB when children live in Poland?

Are there any Poles, who in your opinion should not be eligible for benefits in GB? Who should not be entitled to help of English state?

Which system of public services and benefits is fairer – one dependent on individual contributions or on individual needs regardless of contributions?

How would you assess your position (financial and occupational) in GB in comparison to British people?

And in comparison with your position in Poland before leaving?

And in comparison with the position of other Poles working in London?

VI. Contacts with Poland and transnational usage of entitlements

What contacts with Poland do you currently maintain?

How often do you go to Poland? What services do you use whilst in Poland? (e.g. healthcare)

Would you be entitled to any services or social assistance in Poland if you returned?

Are you claiming or have you ever claimed any benefits in Poland? (e.g. unemployment benefit, retirement pension, housing allowance etc.)

Are you helping each other out within the family? Could you count on the help from relatives if you returned?

Are you saving for the retirement in some way? Which country do you plan to claim your retirement benefits?

VII. Migration plans

How long do you plan to stay in GB now? Why?

What would prompt you to go back to Poland?

With hindsight how would you assess your decision to come to GB?

How do you imagine your situation in a year's time?

VIII. Identification / civic identity

What group of people do you identify with at the moment the most?

Why with this group in particular?

How do the relationships between Poles and other nationalities shape up in your place of work / neighbourhood?

Are you interested in the affairs of the place where you currently live?

Have you ever intervened in the local matters?

Are you going to vote in local elections? Why?

Are you following the political situation in GB? Do you read newspapers? What interests you the most? Why not? Etc.

How have you solved the formalities with regard to your status on the labour market and residence here?

Do you have a NINo?

Are you registered in the WRS?

Do you have a residence permit or permanent residence status here?

Do you plan to apply for British citizenship? Why yes / no?

To what extent do you feel a part of British society? In which situations?

How Poland joining EU affected your personal situation? Do you owe something to EU?

How would you summarise, what you gain and what you lose by living abroad?

What did staying in England teach you? How did it change your views?

Do you want to add anything else?

Post-interview form

- Age: Gender:
- Year of first arrival to London (*including for holidays etc*):
- Since when do you remain here 'for good', with a view to stay for longer?:monthyear
- Education:
- Marital status (*legal*):.....
- Marital status at the time of deciding to stay 'for longer':
- Children (*how many, what age, born in GB or in PL*):.....
- Who out of close family members (partner, children, parents, siblings) arrived to GB first and when?Who? which year?
- Who did you live with after arriving to London 'for longer'?
- Who do you live with at the moment?: How many persons including respondent?..... persons (*relation, nationality, age, gender, year of arrival to GB*)
- London borough in which you currently live:
- Number of rooms (*including living room*)
- Housing tenure: (*rent independently/ subrenting / social / rent from employer*)
- Ile razy się przeprowadzał od czasu przyjazdu do WB?
- Place of birth in PL (*voivodship or big city*):
- Place of residence in PL (*before arrival to GB*):
- Who did you live with in PL before arrival to GB? (*number of household members and relation*):
- Who out of the close family members (*parents, spouses, children, siblings*) remain currently in Poland:
- Employment experience in PL (*main occupation*):
- Employment experience in GB (*main occupation*):
- Labour market position in GB (*self-employed, full-time, part-time, unemployed, housewife etc*)
- Are you registered with the WRS?: Yes / No / Exempt because
Since when?.....
- Have you got a registration certificate after 12 months? Yes/ No / Don't know about it
- Do you have a NINo? Yes/No since when?
Issued for employment / benefit claiming purposes
- Are you registered with a GP? Yes / No Since when?
- Number and type of welfare benefits claimed in GB:.....
- Number and type of welfare benefits claimed in PL:.....

Re-contact

- Do you agree to be re-contacted in 2009?YES/ NO
- Preferred mode of contact: EMAIL / TELEPHONE / POSTAL address (in PL or GB)
- EMAIL: TELEPHONE: ADDRESS:.....

Appendix 3. (2007/08 London study), List of participants

No.	Pseudonym	Gender	Age group	Educational attainment	UK labour market status	UK family unit ¹ type
1	Agata	Female	25-34	Higher	housewife	couple with dependent children
2	Alicja	Female	45-54	Secondary	unemployed	one-person
3	Andrzej	Male	65-70	Secondary	self-employed	one-person
4	Anna	Female	25-34	Secondary	employee part-time	one-person
5	Arek	Male	25-34	Secondary	unemployed	one-person
6	Bartek	Male	25-34	Secondary	self-employed	one-person
7	Basia	Female	25-34	Higher	housewife	couple with dependent children
8	Beata	Female	25-34	Higher	housewife	couple with dependent children
9	Bogdan	Male	35-44	Secondary	unemployed	one-person
10	Danuta	Female	55-64	Higher	'house-granny'	one-person
11	Darek	Male	25-34	Secondary	self-employed	one-person
12	Dawid	Male	25-34	Secondary	employee full-time	couple with dependent children
13	Emilia	Female	25-34	Higher	unemployed	couple without dependent children
14	Ewa	Female	25-34	Higher	employee full-time	couple (same sex) without dependent children
15	Franek	Male	25-34	Secondary	self-employed	one-person
16	Genowefa	Female	55-64	Secondary	employee full-time	one-person
17	Helena	Female	35-44	Elementary	employee full-time	couple without dependent children
18	Irena	Female	25-34	Higher	employee full-time	couple (same sex) without dependent children
19	Janina	Female	55-64	Secondary	'house-granny'	one-person
20	Janusz	Male	45-54	Secondary	self-employed	couple without dependent children
21	Jarek	Male	25-34	Secondary	self-employed	couple with dependent children
22	Joanna	Female	23-24	Higher	housewife	couple with dependent children
23	Jolanta	Female	23-24	Higher	employee full-time	couple without dependent children
24	Justyna	Female	25-34	Higher	housewife	couple with dependent children
25	Karol	Male	25-34	Higher	employee full-time	one-person
26	Karolina	Female	35-44	Higher	employee full-time	couple with dependent children
27	Kasia	Female	23-24	Secondary	housewife	couple with dependent children
28	Kazik	Male	25-34	Secondary	self-employed	couple with dependent children
29	Krystyna	Female	25-34	Higher	employee full-time	couple without dependent children
30	Leszek	Male	23-24	Higher	employee full-time	one-person
31	Lidia	Female	25-34	Higher	employee full-time	couple (same sex) without dependent children
32	Magda	Female	25-34	Secondary	housewife	couple with dependent children
33	Marcin	Male	35-44	Higher	employee full-time	one-person
34	Marek	Male	55-64	Higher	unemployed	couple without dependent children
35	Maria	Female	55-64	Secondary	'house-granny'	one-person
36	Mariola	Female	25-34	Higher	housewife	couple with dependent children
37	Marta	Female	25-34	Higher	employee full-time	one-person
38	Marzena	Female	25-34	Secondary	self-employed	lone mother with children
39	Mateusz	Male	25-34	Higher	employee full-time	couple with dependent children
40	Michał	Male	25-34	Higher	employee full-time	couple (same sex) without dependent children
41	Monika	Female	25-34	Higher	employee full-time	couple without dependent children
42	Natalia	Female	25-34	Secondary	self-employed	couple without dependent children
43	Ola	Female	25-34	Higher	employee full-time	one-person
44	Patryk	Male	25-34	Elementary	unemployed	one-person
45	Paweł	Male	45-54	Secondary	employee full-time	one-person
46	Piotr	Male	25-34	Higher	unemployed	couple without dependent children
47	Renata	Female	25-34	Higher	self-employed	couple without dependent children
48	Roman	Male	45-54	Secondary	unemployed	one-person
49	Ryszard	Male	55-64	Secondary	employee part-time	one-person
50	Sabina	Female	25-34	Secondary	unemployed	lone mother with children
51	Sebastian	Male	35-44	Secondary	self-employed	couple without dependent children
52	Stanisław	Male	65-70	Secondary	'house-grandad'	one-person
53	Sylvia	Female	25-34	Higher	employee full-time	couple (same sex) without dependent children
54	Teresa	Female	55-64	Elementary	employee part-time	one-person
55	Tomek	Male	25-34	Higher	employee full-time	couple without dependent children
56	Wacław	Male	55-64	Secondary	self-employed	one-person
57	Wanda	Female	25-34	Higher	employee full-time	lone mother with children
58	Wiktor	Male	25-34	Secondary	unemployed	one-person
59	Zbigniew	Male	35-44	Secondary	self-employed	one-person
60	Zenon	Male	45-54	Secondary	self-employed	one-person
61	Zofia	Female	45-54	Secondary	housewife	couple without dependent children
62	Zygmunt	Male	45-54	Secondary	unemployed	one-person

¹ according to the Labour Force Survey definition

Appendix 4. (2007/08 London study), Participants' place of residence in Poland

Figure 8. (2007/08 London study) Location of participants in Poland before arrival to the UK

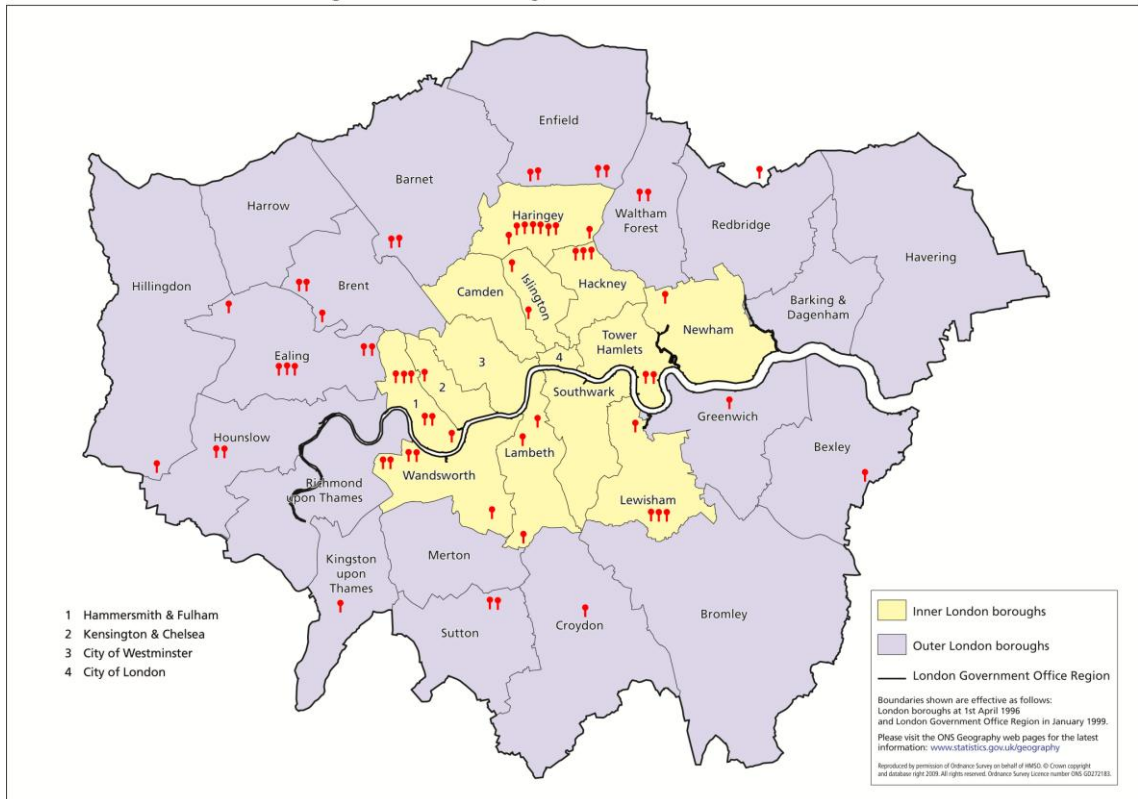


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Appendix 5. (2007/08 London study), Participants' place of residence in London

Figure 9. (2007/08 London study) Location of participants in Greater London

London Government Office Region: London Boroughs, 2009



Office for
National Statistics

Produced by ONS Geography
GIS & Mapping Unit

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Appendix 6. (2007/08 London study), Participants' characteristics

Table 7. (2007/08 London study) Participants' age

	Female	Male	Total
23-34	24	15	39
35-54	4	9	13
55-70	5	5	10
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 8. (2007/08 London study) Length of stay since arrival to the UK

	Female	Male	Total
Up to 2 years	8	12	20
Between 2 and 5 years	22	14	36
Between 5 and 10 years	2	2	4
Between 10 and 15 years	1	1	2
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 9. (2007/08 London study) Previous labour migration experience¹

	Female	Male	Total
Yes	8	19	27
No	25	10	35
Total	33	29	62

¹ including previous labour migrations to the UK

Source: Interviews with Polish migrants in London (2007/2008)

Table 10. (2007/08 London study) Planned duration of stay in the UK¹

	Female	Male	Total
Open issue	11	11	22
Stay for 1 to 2 years	3	4	7
Stay for 5 to 10 years	6	4	10
Stay for a long time	13	10	23
Total	33	29	62

¹ compiled on the basis of declarations given during in-depth interview

Source: Interviews with Polish migrants in London (2007/2008)

Table 11. (2007/08 London study) Planned duration of stay in the UK¹ by the actual duration of stay to date

Planned duration of stay	Actual duration of stay				Total
	Up to 2 years	2 years but up to 5 years	5 years and up to 10 years	10 years but up to 15 years	
Open issue	8	13	0	1	22
Stay for 1-2 years	1	6	0	0	7
Stay for 5-10 years	4	5	1	0	10
Stay for a long time	7	12	3	1	23
Total	20	36	4	2	62

¹ compiled on the basis of declarations given during in-depth interview

Source: Interviews with Polish migrants in London (2007/2008)

Table 12. (2007/08 London study) Participants' educational attainment

	Female	Male	Total
Higher	20	8	28
Secondary	11	20	31
Elementary	2	1	3
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 13. (2007/08 London study) Knowledge of English

	Female	Male	Total
Advanced	17	5	22
Intermediate	7	10	17
Basic	6	12	18
None	3	2	5
Total	33	29	62

¹ compiled on the basis of declarations given during in-depth interview

Source: Interviews with Polish migrants in London (2007/2008)

Table 14. (2007/08 London study) Family unit type in the UK

	Female	Male	Total
One-person	9	19	28
Couple without dependent children	8	5	13
Couple (same sex) without dependent children	4	1	5
Couple with dependent children	9	4	13
Lone parent with children	3	0	3
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 15. (2007/08 London study) Participants' marital status (*de jure*)

	Female	Male	Total
Single never married	15	12	27
Married	12	9	21
Divorced	5	7	12
Widowed	1	1	2
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 16. (2007/08 London study) Dependent children

	Female	Male	Total
No children	13	13	26
Dependent children ¹	13	9	22
Non-dependent children only	7	7	14
Total	33	29	62

¹ children under 16 years of age or aged 16 to 18 in education

Source: Interviews with Polish migrants in London (2007/2008)

Table 17. (2007/08 London study) Labour market status in the UK

	Female	Male	Total
Employee full-time	13	8	21
Employee part-time	2	1	3
Self-employed	3	11	14
Unemployed	3	8	11
Looking after household	12	1	13
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 18. (2007/08 London study) Registration with the WRS

	Female	Male	Total
Yes	14	3	17
No	16	13	29
Exempt	2	12	14
Missing data	1	1	2
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 19. (2007/08 London study) Serious health problems

	Female	Male	Total
Yes	3	4	7
No	30	25	55
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 20. (2007/08 London study) Housing tenure

	Female	Male	Total
Rented directly from private landlord	18	11	29
Subrented privately	5	8	13
Lived rent free (with family members)	5	1	6
Rented from social landlord	3	1	4
Owned	2	1	3
Squatted	-	4	4
Slept rough	-	3	3
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 21. (2007/08 London study) Application for local authority housing in the UK

	Female	Male	Total
Yes	8	4	12
No	25	25	50
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 22. (2007/08 London study) Usage of a support centre for migrants

	Female	Male	Total
Yes	3	9	12
No	30	20	50
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 23. (2007/08 London study) Claiming at least one welfare benefit

	Female	Male	Total
Yes	13	6	19
No	20	23	43
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Table 24. (2007/08 London study) Type of benefit claimed

	Female	Male	Total
Child Benefit	11	4	15
Working Tax Credit	9	4	13
Child Tax Credit	9	2	11
Housing Benefit	6	4	10
Council Tax Benefit	3	1	4
Jobseeker's Allowance (income-based)	2	-	2
Incapacity Benefit	-	1	1
Pension Credit	-	1	1

Source: Interviews with Polish migrants in London (2007/2008)

Table 25. (2007/08 London study) Registration with a GP

	Female	Male	Total
Yes	26	18	44
No	6	11	17
Missing data	1	-	1
Total	33	29	62

Source: Interviews with Polish migrants in London (2007/2008)

Appendix 7. (2009 London study), Summary of findings report

[Note: This report contains preliminary research findings as of March 2009. It has been disseminated among participants to stimulate their feedback. It avoids academic terminology and simplifies the main arguments for the benefit of the non-specialist audience. It is available only in Polish.]

„Od migrantów do obywateli? Prawa społeczne Polaków w Londynie”

Podsumowanie wyników badania socjologicznego

Raport dla uczestników

- W 2007 i 2008 roku przeprowadziłam rozmowy z 62 polskimi migrantami, przebywającymi w owym czasie w Londynie.
- Badanie miało na celu rozpoznanie kwestii związanych z korzystaniem przez Polaków w Londynie z praw społecznych, jakie przysługują wszystkim obywatelom Unii Europejskiej. Prawa społeczne są tu definiowane jako korzystanie z brytyjskich usług i świadczeń społecznych – służby zdrowia, zasiłków i mieszkań socjalnych.
- Oficjalne brytyjskie statystyki pokazują, że Polacy rzadziej niż obywatele Wielkiej Brytanii pobierają zasiłki państwowe. Poza tym obywatele polscy pobierają głównie zasiłki przysługujące osobom pracującym i posiadającym dzieci (takie jak working tax credit, child tax credit i child benefit).
- Uczestnicy badania, którzy z różnych powodów stracili kontakt z brytyjskim rynkiem pracy, borykali się z formalnymi ograniczeniami w dostępie do zasiłków i mieszkań socjalnych pomimo niejednokrotnie trudnej sytuacji materialnej, zdrowotnej i mieszkaniowej.
- W odróżnieniu od zasiłków i mieszkań socjalnych, większość osób nie zetknęła się z formalnymi utrudnieniami w dostępie do służby zdrowia. Dostęp do brytyjskiej służby zdrowia nie jest bowiem uzależniony od płacenia składki zdrowotnej czy posiadania zatrudnienia, a jedynie od zamieszkiwania w Wielkiej Brytanii.
- Większość rozmówców była zdania, że dostęp do zasiłków i mieszkań socjalnych powinien być uzależniony od wkładu danej osoby w dobro wspólne i od wypełniania przez nią obowiązków obywatelskich. Rozmówcy uważali, że fakt, iż zdecydowana większość Polaków pracuje i płaci podatki, uprawnia Polaków do dostępu do brytyjskich świadczeń społecznych.
- Większość respondentów nie miała zamiaru ubiegać się o obywatelstwo brytyjskie, ponieważ nie daje ono dodatkowych praw ponad te, które są istotne i już dostępne z tytułu obywatelstwa Unii Europejskiej oraz z powodu braku identyfikacji z Wielką Brytanią jako krajem bądź narodem.
- Pomimo to większość uczestników badania utożsamiała się z lokalną dzielnicą i Londynem jako kulturowo i etnicznie zróżnicowaną społecznością miejską. Sam fakt zamieszkania na jakiejś przestrzeni powoduje chęć dbania o otoczenie i zainteresowanie sprawami lokalnymi.
- To, czy ktoś korzystał z przysługujących mu praw, czy też preferował pozostanie na uboczu brytyjskiego systemu świadczeń społecznych, zależało między innymi od stopnia sprecyzowania dalszych planów migracyjnych. Osoby nastawione na ewentualny szybki powrót minimalizowały kontakty z oficjalnymi instytucjami brytyjskimi po to, by zachować jak największą swobodę w planowaniu swojej mobilności.
- Świadczenia społeczne lub usługi, z których rozmówcy korzystali w Wielkiej Brytanii, na ogół nie miały bezpośredniego wpływu na decyzje migracyjne, które były uzależnione przede wszystkim od osobistej sytuacji ekonomicznej, zawodowej bądź rodzinnej.
- Korzystanie z praw społecznych w Wielkiej Brytanii i w Polsce miało niekiedy wpływ pośredni, gdyż moment osiągnięcia wieku szkolnego czy emerytalnego wpływał na wybór najbardziej dogodnego czasu do wyjazdu czy powrotu.
- Osoby zainteresowane tymi wynikami zachęcam do lektury załączonego obszerniejszego raportu.
- Byłabym wdzięczna za wypełnienie ankiety internetowej, znajdującej się pod adresem <http://opinio.ucl.ac.uk/s?s=pollondyn>, mającej na celu uchwycenie zmian w sytuacji życiowej i poglądach uczestników badania.
- Serdecznie dziękuję wszystkim rozmówcom za udział i za zapoznanie się z wynikami mojego badania!

Dorota Osipovič

11.03.2009, Londyn

1. Wstęp

W 2007 i 2008 roku przeprowadziłam rozmowy z 62 polskimi migrantami, przebywającymi w owym czasie w Londynie. Moi rozmówcy pochodzili z różnych zakątków Polski i mieszkali w różnych dzielnicach Londynu.

Moim celem było dotarcie do jak najróżnorodniejszej grupy osób. Chodziło mi bowiem o rozpoznanie kwestii korzystania przez Polaków z praw społecznych, jakie przysługują wszystkim obywatelom Unii Europejskiej. Przez prawa społeczne rozumiem korzystanie z brytyjskich usług publicznych i świadczeń społecznych, takich jak służba zdrowia, zasiłki czy mieszkania socjalne. Chciałam ustalić, w jaki sposób korzystanie z brytyjskich praw społecznych wpływa na warunki życiowe i plany polskich migrantów, a także na ogólny poziom satysfakcji z pobytu w Wielkiej Brytanii. Interesowało mnie, z jakimi problemami Polacy stykają się na co dzień, jak sobie radzą w trudnych sytuacjach oraz jakie są pozytywne i negatywne strony posiadania praw społecznych w Wielkiej Brytanii?

Moi rozmówcy byli zróżnicowani pod względem płci (33 kobiety, 29 mężczyzn), wieku (najmłodszy uczestnik miał 23 lata, a najstarszy 70), edukacji (3 osoby z wykształceniem podstawowym, 28 – średnim, 31 – wyższym), typu jednostki rodzinnej w Wielkiej Brytanii (28 osób zamieszkiwało bez partnera/ki, 18 osób mieszkało z partnerem/ką, w tym 5 osób z partnerem/ką tej samej płci, 13 osób mieszkało z partnerem/ką i z dziećmi, a 3 osoby mieszkały z dziećmi). Zdecydowana większość osób (56) przebywała w Wielkiej Brytanii nie dłużej niż 5 lat.

Co niemniej ważne, uczestnicy badania korzystali ze świadczeń społecznych w Wielkiej Brytanii w różnym stopniu. 19 osób pobierało przynajmniej jeden zasiłek w momencie wywiadu, z kolei 43 osoby nie pobierały żadnych zasiłków. Większość rozmówców wynajmowała dom lub mieszkanie, bądź podnajmowała pokój od osób wynajmujących prywatnie. Udało mi się jednak również dotrzeć do osób, które wynajmowały mieszkania od tak zwanych „właścicieli społecznych” (registered social landlords) – gmin lokalnych czy spółdzielni mieszkaniowych – lub złożyły aplikację o takie mieszkanie. Część uczestników badania znajdowała się w szczególnie trudnej sytuacji mieszkaniowej. Były to osoby zagrożone bezdomnością, które w momencie badania mieszkały na squatach, w tymczasowych hostelach lub zwyczajnie „na ulicy”. Z kolei troje rozmówców posiadało własne domy w Londynie.

Uczestnicy mieli również zróżnicowane doświadczenia i opinie, jeśli chodzi o korzystanie z brytyjskiej służby zdrowia. Osoby, które miały poważniejsze problemy zdrowotne, wymagające stałej opieki lekarskiej, korzystały dość regularnie z usług brytyjskiej NHS. Natomiast większość rozmówców miała jedynie sporadyczny kontakt ze służbą zdrowia, a 17 osób w ogóle nie było zarejestrowanych u lekarza pierwszego kontaktu (GP).

Oficjalne brytyjskie statystyki pokazują, że Polacy rzadziej niż obywatele Wielkiej Brytanii pobierają zasiłki państwowe.¹⁶⁶ W dodatku obywatele polscy pobierają głównie zasiłki przysługujące osobom pracującym i posiadającym dzieci (takie jak working tax credit, child tax credit i child benefit). Jednym z celów tego badania było rozeznanie się, jakie rzeczywiste sytuacje i historie kryją się za tymi statystykami. Dlaczego Polacy korzystają z zasiłków w mniejszym stopniu niż inni mieszkańcy Wielkiej Brytanii? Jak Polacy oceniają jakość brytyjskich świadczeń społecznych? Jaki jest stosunek Polaków do Wielkiej Brytanii? Jaki jest zakres naszych praw i obowiązków w opinii nas samych? Poniżej przedstawiam wybrane wnioski, płynące z tego badania.

2. Zasiłki, mieszkania socjalne, służba zdrowia – dostępność i ocena

Zdecydowana większość moich rozmówców nie korzystała z zasiłków w Wielkiej Brytanii. Jednakże za tym faktem kryły się bardzo różne przyczyny. Po pierwsze, osoby, które nie znały w dostatecznym stopniu języka angielskiego, nie posiadały wystarczających informacji o istniejących możliwościach i uprawnieniach. W takich przypadkach jedynym źródłem informacji na temat praw społecznych pozostawali pośrednicy oferujący płatne usługi w tym zakresie.

Po drugie, część rozmówców borykała się z ograniczeniami prawnymi w dostępie do zasiłków pomimo niejednokrotnie trudnej sytuacji materialnej, zdrowotnej i mieszkaniowej. Były to osoby, które z różnych powodów straciły kontakt z brytyjskim rynkiem pracy. Istniejące ograniczenia w dostępie do zasiłków dla osób nieaktywnych zawodowo tłumaczą w pewnym stopniu przytoczone statystyki, które pokazują, że jedynie znikomy odsetek Polaków pobiera zasiłki przeznaczone dla osób niepracujących, takie jak na przykład income support.

Istniejące ograniczenia w dostępie do pomocy materialnej i mieszkaniowej powodowały niejednokrotnie sytuacje patowe. Na przykład, gdy doraźna pomoc materialna, niezbędna do stworzenia odpowiednich warunków do rekonwalescencji, była uzależniona od podjęcia pracy przez daną osobę, co z kolei było uzależnione od poprawy jej stanu zdrowia. Podobnie, aby móc się ubiegać o mieszkanie socjalne, osoby zagrożone bezdomnością musiały najpierw znaleźć stałe, legalne, długoterminowe zatrudnienie, co w praktyce, zważywszy na brak podstawowych warunków bytowych, było trudne do zrealizowania.

Nieocenioną pomoc w podobnych sytuacjach okazywali członkowie rodziny, zapewniając nieodpłatne pośrednictwo w kontaktach z urzędnikami, przejmując obowiązki domowe czy pomagając w opiece nad dziećmi. Tego rodzaju nieformalne wsparcie ze strony członków rodziny umożliwiało na przykład kontynuację zatrudnienia przez rodziców samotnie wychowujących dzieci, a tym samym zachowanie przez nich prawa do dodatkowych zasiłków i ulg podatkowych dla osób pracujących. Jednakże nie wszyscy rozmówcy mogli liczyć na wszechstronną pomoc członków rodziny. W takich przypadkach jedynym źródłem wsparcia i pomocy pozostawały organizacje charytatywne, działające w Londynie.

Odrębną kategorię stanowiły osoby, które wolały nie pobierać zasiłków w Wielkiej Brytanii, chociaż były do tego uprawnione. Po części taka decyzja była związana z negatywnymi opiniami na temat pobierania zasiłków, a po części wynikała z nastawienia na krótkotrwały pobyt. Mając na względzie ewentualny szybki powrót, „nie było sensu (...) pchać się w biurokrację tutaj” (Kazik)¹⁶⁷,

¹⁶⁶ Zgodnie z danymi brytyjskiego sondażu Labour Force Survey, w latach 2007/08 niecałe 20% obywateli polskich pobierało przynajmniej jeden zasiłek państwowy w Wielkiej Brytanii, w porównaniu z 40% obywateli brytyjskich (LFS 2007/08, obliczenia własne).

¹⁶⁷ Imiona uczestników badania zostały zmienione.

jak wyraził się jeden z uczestników. Niekiedy takie nastawienie wiązało się również z wykonywaniem pracy „na czarno”. Niektórzy respondenci byli zainteresowani zachowaniem jak największej swobody w planowaniu swojej mobilności. Dzięki minimalnym kontaktom z oficjalnymi instytucjami brytyjskimi osoby te mogłyby dość szybko „zmienić kraj” (Franek), gdyby zaszła taka potrzeba. Taka postawa charakteryzowała głównie mężczyzn, przebywających w Londynie bez członków rodziny.

Osoby pracujące i członkowie ich rodzin miały o wiele łatwiejszy dostęp do zasiłków w Wielkiej Brytanii niż osoby pozostające bez pracy. W szczególności młode rodziny z dziećmi oceniały pozytywnie zastrzyk finansowy w postaci takich zasiłków jak tax credits czy housing benefit, który pozwolił im na znaczne polepszenie warunków życiowych, na przykład na wyprowadzenie się z podnajmowanego pokoju w dzielonym mieszkaniu i wynajęcie mieszkania samodzielnie. Również kobiety pracujące i samotnie wychowujące dzieci doceniały dodatek finansowy w postaci zasiłków rodzinnych i mieszkaniowych w budżetach ich gospodarstw domowych.

Jeśli chodzi o tzw. mieszkania socjalne, to jedynie 5 uczestników badania wynajmowało mieszkania od tzw. „właścicieli społecznych”. Podobnie jak w przypadku zasiłków, osoby niepracujące miały ograniczony dostęp do brytyjskich mieszkań socjalnych. Dostęp był dodatkowo utrudniony z powodu długich kolejek oczekujących na mieszkania socjalne w dzielnicach Londynu. Pomimo to 12 respondentów złożyło aplikację o przydział mieszkania z gminy lokalnej. W przypadku osób, dla których kredyty mieszkaniowe na zakup mieszkania na londyńskim rynku nieruchomości pozostawały nieosiągalne, staranie się o mieszkanie socjalne było jedyną nadzieją na zagwarantowanie długofalowej, stabilnej opcji mieszkaniowej. Rozmówcy, którzy już mieszkali w mieszkaniach socjalnych z gwarancją długoterminowego najmu cenili sobie taką stabilność. Jednakże jakość ich mieszkań wahała się znacząco, obejmując mieszkania zarówno o wysokim, jak i niskim standardzie.

W odróżnieniu od zasiłków i mieszkań socjalnych, większość osób nie zetknęła się z formalnymi utrudnieniami w dostępie do służby zdrowia. Dostęp do brytyjskiej służby zdrowia nie jest bowiem uzależniony od płacenia składki zdrowotnej czy posiadania zatrudnienia, a jedynie od zamieszkania w Wielkiej Brytanii. Pomimo tego, znaczna liczba osób nie korzystała z usług brytyjskiej służby zdrowia. Po części wiązało się to z brakiem takiej potrzeby, lecz w pewnej mierze było również konsekwencją problemów językowych oraz negatywnej oceny jakości oferowanych usług. Źródłem wielu nieporozumień pomiędzy polskimi pacjentami a brytyjskimi lekarzami były problemy natury komunikacyjnej (na przykład przenoszenie oczekiwań ukształtowanych na podstawie polskich doświadczeń na pracowników brytyjskiej służby zdrowia). Problemem była również niewiedza, dokąd należy udać się po pomoc w konkretnym wypadku, wynikająca z braku rozeznania w strukturze organizacyjnej NHS. Z tych i innych powodów wiele osób korzystało z odpłatnych usług lekarzy w Polsce (głównie dentystów, ginekologów i okulistów) przy okazji wizyt w kraju. Jednakże było to uzależnione od posiadania środków finansowych oraz w pewnym stopniu od posiadania kontaktów i znajomości wśród polskich lekarzy prowadzących prywatną praktykę.

3. Jak być powinno? Zasady korzystania z dóbr publicznych

W trakcie rozmowy poruszaliśmy kwestie dotyczące nie tylko tego „jak jest”, ale również tego „jak być powinno” – na jakich zasadach Polacy powinni mieć dostęp do brytyjskich zasiłków i mieszkań socjalnych.

Większość rozmówców była zdania, że dostęp do zasiłków i mieszkań socjalnych powinien być uzależniony od wkładu danej osoby w dobro wspólne i od wypełniania przez nią obowiązków obywatelskich. Istnieje wiele sposobów, w jakie można przyczynić się do powiększania dobra wspólnego, jednak najważniejszym, zdaniem badanych, pozostaje wkład poprzez pracę i płacenie podatków. Moi rozmówcy uważali, że fakt, iż zdecydowana większość Polaków pracuje i płaci podatki, uprawnia Polaków do dostępu do brytyjskich świadczeń społecznych, takich jak zasiłki i mieszkania socjalne.

Na podstawie wywiadów można wyciągnąć wniosek, że praca ma nie tylko wartość pieniężną, ale również moralną i etyczną. Uczestnicy badania uważali, że każdy rodzaj pracy jest lepszy od „nicnierobienia” i powinien być odpowiednio doceniany. A więc również prowadzenie domu i opieka nad dziećmi czy też praca poniżej kwalifikacji była uważana za zajęcie przynoszące korzyść społeczną. Jedynie praca nielegalna spotkała się z niejednoznaczną oceną, bowiem z jednej strony jest to zajęcie wartościowe poprzez sam fakt wykonywania pracy, lecz z drugiej strony osoby pracujące na czarno łamią obowiązujące prawa i nie uczestniczą w zbiorowej umowie społecznej, zapewniającej dostęp do świadczeń społecznych w zamian za płacenie podatków.

Konsekwencją podkreślenia znaczenia wkładu poprzez pracę była jednocznie surowa ocena osób, postrzeganych jako niepracujące „na własne życzenie” (Maria), bez względu na narodowość czy pochodzenie takich osób. Z drugiej strony, wysoka ocena wkładu w dobro wspólne poprzez pracę leżała u podłoża argumentacji, że osoby pracujące powinny mieć pierwszeństwo na listach oczekujących na mieszkania socjalne.

Poza tym, uczestnicy skłaniali się ku opinii, że wypełnianie obowiązków obywatelskich oraz wkład w dobro ogółu powinny niejako poprzedzać uzyskanie praw społecznych. Zatem większość uczestników uważała, że wymóg rejestracji pierwszych 12 miesięcy pracy w Wielkiej Brytanii, dopełnienie którego prowadzi do traktowania na równi z obywatelami tzw. „starych” krajów Unii Europejskiej, jest uzasadniony. Wymóg ten był odbierany jako swoisty „okres próbny”, służący do sprawdzenia „czy jest się dla nich, (...), potencjalnym przyszłym obywatelem” (Joanna).

4. Stosunek do Londynu i Wielkiej Brytanii

Większość respondentów nie miała zamiaru ubiegać się o obywatelstwo brytyjskie z powodów praktycznych. Uważano, iż posiadanie obywatelstwa brytyjskiego „nie jest (...) do niczego potrzebne” (Jolanta), nie daje dodatkowych praw ponad te, które są istotne i już dostępne z tytułu obywatelstwa Unii Europejskiej. Po drugie, brak zainteresowania paszportem brytyjskim wynikał również z braku identyfikacji z Wielką Brytanią:

„Ja się czuję Polką, jestem tutaj, owszem mówię po angielsku i tak dalej, staram się poznać tę kulturę i się dostosować (...) ale nie czuję się na tyle zżyta z tym krajem, żeby powiedzieć, że to mój kraj. Nie, to nie jest mój kraj, ja tu po prostu żyję, płacę podatki, ten kraj mi coś daje. Pracę, mieszkanie i tak dalej. I tyle.” (Jolanta)

Wyjątek stanowiły osoby, które traktowały przyjazd do Wielkiej Brytanii jako rozpoczęcie nowego rozdziału życia. Wiązanie przyszłości z Wielką Brytanią, a zarazem ograniczone kontakty z Polską, wiązały się więc z potencjalnym nabyciem obywatelstwa brytyjskiego w przyszłości. Również niektóre osoby pozostające w związkach partnerskich z osobami tej samej płci rozważały nabycie obywatelstwa brytyjskiego. Powodowane to było zagwarantowaniem praw i wolności osobistych gejów i lesbijek oraz uznaniem związków partnerskich w świetle prawa brytyjskiego.

W odróżnieniu od paszportu brytyjskiego, sporo osób planowało wyrobienie dokumentu potwierdzającego fakt stałego zamieszkiwania w Wielkiej Brytanii (permanent residence card), który był postrzegany jako przydatny w kontaktach z urzędami i ułatwiający załatwianie wielu codziennych spraw.

Pomimo ogólnego odrzucenia identyfikacji z Wielką Brytanią jako krajem bądź narodem, większość osób utożsamiała się z lokalną dzielnicą i Londynem jako swoistą, zróżnicowaną „społecznością miejską” (Wiktor). Sam fakt zamieszkania na jakiejś przestrzeni powoduje chęć dbania o otoczenie i zainteresowanie sprawami lokalnymi, co z kolei wpływa na chęć brania udziału w podejmowaniu decyzji w sprawach lokalnych, na przykład poprzez uczestniczenie w wyborach lokalnych, referendach czy konsultacjach.

5. Plany migracyjne

To, czy ktoś korzystał z przysługujących mu praw, czy też preferował pozostanie na uboczu brytyjskiego systemu świadczeń społecznych, zależało od stopnia sprecyzowania dalszych planów migracyjnych. Ponad jedna trzecia uczestników badania traktowała plany dalszego pobytu w Londynie jako kwestię otwartą i niesprecyzowaną. Osoby te, poza kilkoma wyjątkami, nie pobierały zasiłków i nie starały się o mieszkania socjalne w Wielkiej Brytanii.

Decyzje o pozostaniu w Wielkiej Brytanii, powrocie do Polski bądź wyjeździe do innego kraju były uzależnione od sytuacji ekonomicznej, zawodowej bądź rodzinnej. Świadczenia społeczne lub usługi, z których rozmówcy korzystali w Wielkiej Brytanii, na ogół nie miały bezpośredniego wpływu na decyzje migracyjne. Wyjątkiem był przypadek młodego małżeństwa, które przy rozważaniu decyzji o powrocie do Polski obok innych czynników brało pod uwagę negatywną ocenę brytyjskiej służby zdrowia i szkolnictwa. Korzystanie z praw społecznych w Wielkiej Brytanii i w Polsce miało niekiedy wpływ pośredni, gdyż moment osiągnięcia wieku szkolnego czy emerytalnego wpływał na wybór najbardziej dogodnego czasu do wyjazdu czy powrotu.

6. Zakończenie

Chciałabym serdecznie podziękować wszystkim rozmówcom za udział oraz za zapoznanie się z wynikami mojego badania. Byłam bardzo mile zaskoczona szerokim odzewem na mój apel o udział w badaniu i jestem niezmiernie wdzięczna każdej osobie, z którą miałam przyjemność porozmawiać na te tematy. Wywiady okazały się niezmiernie interesujące i wielowątkowe. Niestety nie da się w pełni oddać całej różnorodności opinii na tych kilku stronach. Głębszej analizie wypowiedzi jest poświęcona moja praca doktorska. To krótkie sprawozdanie przedstawia jedynie wybrane strategie, poglądy i postawy. Jest to oczywiście moja interpretacja rozmów z Państwem, dlatego też prosiłabym o krytykę, jeśli pewne interpretacje i wnioski są, Państwa zdaniem, nietrafne. Jestem bardzo ciekawa Państwa opinii na ten temat.

7. Prośba o wypełnienie ankiety internetowej

Upływ czasu powoduje, że sytuacje życiowe zmieniają się pod wpływem nowych wydarzeń, a poglądy – pod wpływem nowych doświadczeń. Dlatego też byłabym bardzo wdzięczna za wypełnienie krótkiej ankiety internetowej, mającej na celu uchwycenie głównych zmian w sytuacji życiowej i opiniach uczestników tego badania. Wypełnienie ankiety umożliwi również skomentowanie wyników badania, przedstawionych w tym raporcie.

Indywidualne hasło oraz instrukcja logowania zostaną wkrótce przesłane mailem, zaś ankietę znajdą Państwo pod adresem:

<http://opinio.ucl.ac.uk/s?s=pollondyn>

Jeśli nie korzysta Pan / Pani z internetu, to w najbliższym czasie skontaktuję się z Panem / Panią w celu umówienia się na krótką rozmowę telefoniczną.

Z góry dziękuję i pozdrawiam serdecznie

Dorota Osipovič

Appendix 8. (2009 London study), Follow-up questionnaire items

- Q1. What is your current place of residence?
- Q2. London borough in which you currently reside
- Q3. Current status on the UK labour market
- Q4. Do you claim any UK benefits or tax credits at the moment?
- Q5. Which benefits or tax credits do you claim?
- Q6. Did you apply for any UK benefits or tax credits?
- Q7. Which benefits or tax credits did you apply for?
- Q8. What are your and your partners' net monthly earnings?
- Q9. What is your housing tenure?
- Q10. How many people do you share your kitchen with?
- Q11. Whom do you live with at the moment? (i.e. partner, children etc)
- Q12. Have you applied for council housing?
- Q13. Do you have health conditions that require ongoing medical attention?
- Q14. Are you registered with a GP?
- Q15. How often do you use the NHS?
- Q16. How often do you use private doctors in Poland?
- Q17. How long do you intend to stay in the UK for?
- Q18. What do your migration plans primarily depend on?
- Q19. Do you contemplate return to Poland at the moment?
- Q20. Do you contemplate migration to some other country at the moment?
- Q21 – Q40 [set of similar questions addressed to people who reside in PL]
- Q41 – Q56 [set of similar question addressed to people who reside in some other country]
- Q57. How much are you engaged in business or private affairs in Poland?
- Q58. How often do you maintain contact with family or friends in Poland?
- Q59. How many times have you personally visited Poland last year?
- Q60a. Comparing with last year, are you more or less engaged with business and personal affairs in Poland?
- Q60b. Comparing with last year, are you more or less engaged in maintaining contact with family or friends in Poland?
- Q61a. Currently, do you feel part of British society?
- Q61b. Currently, do you feel part of British nation?
- Q61c. Currently, do you feel part of local community in Britain?
- Q61d. Currently, do you feel part of Polish society?
- Q61e. Currently, do you feel part of Polish nation?
- Q61f. Currently, do you feel part of local community in Poland?
- Q62a. Comparing with last year, do you feel more or less engaged with matters of British society?
- Q62b. Comparing with last year, do you feel more or less engaged with matters of local community in Britain?
- Q62c. Comparing with last year, do you feel more or less engaged with matters of Polish society?
- Q62d. Comparing with last year, do you feel more or less engaged with matters of local community in Poland?
- Q63. Are you or have you been registered with WRS?
- Q64. What were the main reasons for you registration with WRS?
- Q65. Have you got permanent residence in the UK?
- Q66. What were the main reasons for getting permanent residence in the UK?
- Q67. Do you intend to apply for permanent residence in the UK?
- Q68. Why do intend to apply for permanent residence in the UK?
- Q69. Do you have British citizenship?
- Q70. What were the main reasons for obtaining British citizenship?
- Q71. Do you intend to apply for British citizenship?
- Q72. Why do you intend to apply for British citizenship?
- Q73. What is your current marital status?
- Q74. What is your education attainment?
- Q75. How do you rate your level of English?
- Q76. What are your reflections about taking part in this research?
- Q77. What are your opinions about the results of this research?
- Q78. Any other comments

Appendix 9. (2009 London study), Participants' characteristics

Table 26. (2009 London study) Location of participants in 2009

(Q1)	Responded	Not responded	Total
London	32	4	36
England (excl. London)	3	-	3
Poland	2	4	6
Unknown	-	17	17
Total	37	25	62

Source: On-line questionnaire of Polish migrants in London (March / May 2009)

Table 27. (2009 London study) Planned duration of further stay in 2009 by planned duration in 2007/08¹

		Plans in 2007/08			Total
		Open issue	Stay for 1 to 10 years	Stay for a long time	
(Q17)	Open issue	6	2	2	10
Plans in 2009	Stay for less than 1 year	-	2	-	2
	Stay for 1 to 10 years	1	4	2	7
	Stay for a long time	3	1	12	16
	Already returned to PL	1	1	-	2
	Total	11	10	16	37

¹ compiled on the basis of declarations given during in-depth interview

Source: On-line questionnaire of Polish migrants in London (March / May 2009)

Table 28. (2009 London study) Currently contemplating return to Poland?

(Q19)	Female	Male	Total
Yes	2	3	5
No	18	12	30
Already returned to PL	2	-	2
Total	22	15	37

Source: On-line questionnaire of Polish migrants in London (March / May 2009)

Table 29. (2009 London study) Feeling part of British society, nation, local community; Polish society, nation, local community

(Q61)	British society	British nation	Local community in Britain	Polish society	Polish nation	Local community in Poland
Strongly agree	8	2	6	15	23	10
Somewhat agree	9	-	17	11	5	7
Somewhat disagree	9	13	7	4	2	10
Strongly disagree	6	16	4	-	2	9
Difficult to say	5	6	2	6	4	1
(Missing data)	-	-	1	1	1	-
Total	37	37	37	37	37	37

Source: On-line questionnaire of Polish migrants in London (March / May 2009)

Table 30. (2009 London study) Intention to apply for permanent residence in the UK

(Q67)	Female	Male	Total
Yes	10	6	16
No	9	7	16
Already has PR	3	2	5
Total	22	15	37

Source: Follow-up, on-line questionnaire of Polish migrants in London (March / May 2009)

Table 31. (2009 London study) Intention to apply for British citizenship

(Q71)	Female	Male	Total
Yes	4	4	8
No	17	11	28
Already has BC	1	0	1
Total	22	15	37

Source: On-line questionnaire of Polish migrants in London (March / May 2009)

Table 32. (2009 London study) Claiming at least one welfare benefit

(Q4)	Female	Male	Total
Yes	9	3	12
No	11	12	23
Total	20	15	35 ¹

¹ applies to participants residing in the UK

Source: On-line questionnaire of Polish migrants in London (March / May 2009)

Table 33. (2009 London study) Type of benefit claimed

(Q5)	Female	Male	Total
Child Benefit	7	1	8
Child Tax Credit	7	1	8
Housing Benefit	5	3	8
Working Tax Credit	5	1	6
Council Tax Benefit	2	1	3
Jobseeker's Allowance (income-based)	1	-	1
Incapacity Benefit	-	1	1
Pension Credit	-	1	1

Source: On-line questionnaire of Polish migrants in London (March / May 2009)

Table 34. (2009 London study) Housing tenure in the UK

(Q9)	Female	Male	Total
Rented directly from private landlord	10	8	18
Subrented privately	3	1	4
Lived rent free (with family members)	1	1	2
Rented from social landlord	2	1	3
Rented from employer	-	1	1
Owned	2	1	3
Squatted	2	1	3
Slept rough	-	1	1
Total	20	15	35

[†] applies to participants residing in the UK

Source: On-line questionnaire of Polish migrants in London (March / May 2009)

Table 35. (2009 London study) Registration with a GP

(Q14)	Female	Male	Total
Yes	19	13	32
No	1	2	3
Total	20	15	35

Source: On-line questionnaire of Polish migrants in London (March / May 2009)

Appendix 10. (2009 London study), Selected participants' feedback

"The results surprised me; they differ from public opinion, which claims that we take [zabieramy] benefits and social flats." (Karolina)

"I have been surprised by the results referring to Poles claiming benefits – to be honest I have an impression that all surrounding me Poles claim some or other benefits or live in council flats." (Krystyna)

"I think that the research that you've carried out fully envisions the situation of Poles in Great Britain. I fully agree with the findings and I can say that they are true on the basis of my own experiences. At least in my case." (Mateusz)

"I have seen similarities with Poles' behaviour, they tend to rely on themselves, however at the moment in the situation of (financial) crisis, more persons reach for benefits and try for flats; and persons who planned to return after 'accumulation of savings' [po dorobieniu się] already left or will leave in the nearest future." (Beata)

"I think that the findings should be widely discussed for example in the Polish diaspora press as a precious source of reflection on the aims of its readers' stay in the UK." (Jolanta)

"The results were more or less as I thought" (Renata)

"This is a very interesting research. Provided food for thought" (Magda)

Appendix 11. EU and UK selected legislation and case law

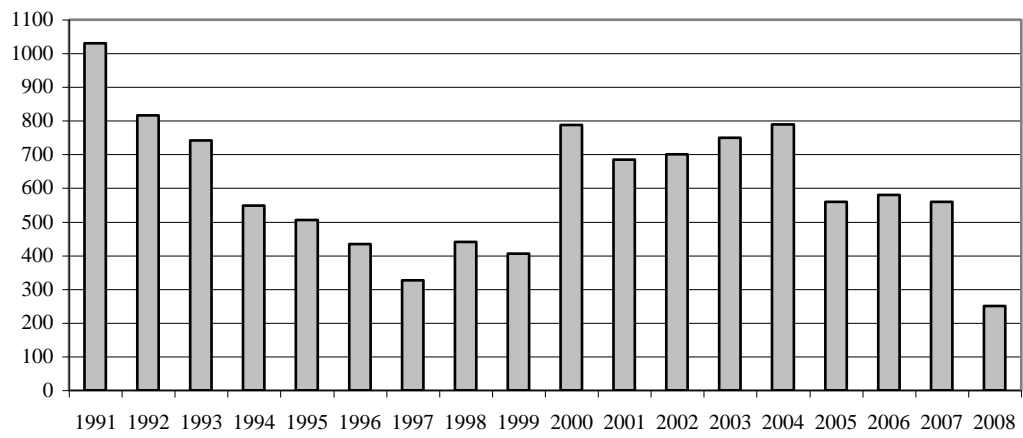
	EU	UK
Legislation	<ul style="list-style-type: none"> ▪ Directive 2004/38/EC of the European Parliament and of the Council of 29 April 2004 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States (“Citizens’ Directive”) ▪ Regulation EC 883/2004 of the European Parliament and of the Council of 29 April 2004 on the coordination of social security systems ▪ The Accession Treaty 2003, Annex V, Chapter 1 (Free Movement of Persons) ▪ Regulation 1408/71 on the application of social security schemes to employed persons, to self-employed persons and to members of their families moving within the Community ▪ Regulation (EEC) 1612/68 of the Council of 15 October 1968 on freedom of movement for workers within the Community 	<ul style="list-style-type: none"> ▪ SI 2009, No. 2731 (C. 119). The Borders, Citizenship and Immigration Act 2009. (Commencement No. 1) Order 2009 ▪ SI 2007, No. 928. Explanatory Memorandum to the Accession (Immigration and Worker Registration)(Amendment) Regulations 2007. ▪ SI 2006, No. 1003. The Immigration (European Economic Area) Regulations 2006. ▪ SI 2006, No. 1026. The Social Security (Persons from Abroad) Amendment Regulations 2006 ▪ SI 2004, No. 1219. The Accession (Immigration and Worker Registration) Regulations 2004. ▪ SI 2004, No. 1232.The Social Security (Habitual Residence) Amendment Regulations 2004 ▪ SI 2004, No. 1235. The Allocation of Housing and Homelessness (Amendment) (England) Regulations 2004 ▪ The Housing Act 1996 ▪ SI 1989, No. 306. National Health Service (Charges to Overseas Visitors) Regulations 1989 (England & Wales)
Guidance	<ul style="list-style-type: none"> ▪ EC 2005 'The Community provisions on social security - Your rights when moving within the European Union - Update 2004', Luxembourg: Office for Official Publications of the European Communities. 	<ul style="list-style-type: none"> ▪ Home Office, 2009. ‘European Casework Instructions’ ▪ Department of Health, 2007. 'Implementing the Overseas Visitors Hospital Charging Regulations. Guidance for NHS Trust Hospitals in England'
Case law	<ul style="list-style-type: none"> ▪ <i>ECJ Nerkowska C-499/06</i> ▪ <i>ECJ Bidar C-209/03</i> ▪ <i>ECJ Trojani C-456/02</i> ▪ <i>ECJ Grzelczyk C-184/99</i> ▪ <i>ECJ Baumbast C-413/99</i> 	<ul style="list-style-type: none"> ▪ <i>Kaczmarek vs. Secretary of State for Work and Pensions no. [2008] EWCA Civ 1310</i> ▪ <i>Zalewska vs. Department for Social Development, no. [2007] NICA 17</i>

Appendix 12. Selected vesting periods applicable to EU migrants in the UK

Minimum required time of residence and/or work	Applies to	What is gained as a result?	Maximum allowed absences / breaks	Reference
At least 12 months of continuous employment registered with WRS	Non-exempt EU8 worker	Status of EU worker or EU jobseeker	Breaks in employment up to maximum of 30 days during 12 months Person must be in employment on the start and end date of 12 month period	The Accession (Immigration and Worker Registration) Regulations 2004
5 years of continuous residence in accordance with conditions attached to the right to reside (EU8 citizens can start to accrue their 5 years from May 2004)	Jobseeker Worker Self-employed Student Self-sufficient	Permanent right of residence	Periods of absence from the UK which do not exceed 6 months in total in any year; absence for military service; or any one absence from the UK for “important reason” – such as pregnancy, serious illness, study, training or overseas posting – not exceeding 12 months Permanent right of residence in the UK is lost if absences from UK are longer than 2 consecutive years	The Immigration (EEA) Regulations 2006
12 months of employment and at least 3 years of continuous residence prior to reaching the statutory retirement age in the UK	A worker or self-employed person who has ceased activity due to reaching retirement age in the UK	Permanent right of residence	Periods of absence from the UK which do not exceed 6 months in total in any year; absence for military service; or any one absence from the UK for “important reason” – such as pregnancy, serious illness, study, training or overseas posting – not exceeding 12 months	The Immigration (EEA) Regulations 2006
At least 2 years of continuous residence in the UK prior to permanent incapacity or in an event of incapacity due to accident at work or occupational disease	A worker or self-employed person who has ceased activity due to becoming permanently incapacitated	Permanent right of residence	Periods of absence from the UK which do not exceed 6 months in total in any year; absence for military service; or any one absence from the UK for “important reason” – such as pregnancy, serious illness, study, training or overseas posting – not exceeding 12 months	The Immigration (EEA) Regulations 2006
10 years of continuous residence	All EU citizens	Additional protection from removal, unless on grounds of public security		The Immigration (EEA) Regulations 2006

Appendix 13. (HO 1991-2008), Polish citizens granted British citizenship

Figure 10. (HO 1991-2008), Polish citizens granted British citizenship



Source: Home Office, *Persons Granted British Citizenship*, Statistical Bulletins, 1991-2008, © Crown Copyright.

Appendix 14. (LFS 2007/08), Methodological note on the LFS data analysis

Labour Force Survey is a large-scale quarterly survey of about 53,000 households in the UK, designed to monitor labour force performance and calculate various labour market indicators (ONS 2007a). For the purpose of this study in order to increase the sample size the LFS datasets from five quarters, covering period from January 2007 till March 2008, were pooled (ONS 2008a; ONS 2008b; ONS 2008c; ONS 2008d; ONS 2008e). LFS has complex sample structure with the same respondent being interviewed for five consecutive quarters and 20% of the sample being replaced each quarter (Rafferty 2008). In order to avoid double counting of respondents, only waves 1 and 5 were chosen from four quarters covering the period from January to December 2008 and only wave 1 respondents were selected from the quarter January to March 2008.

The LFS is a survey and thus any results have to be treated as estimates, affected by sampling and non-sampling errors (ONS 2007a). Specifically, it has been noted that the LFS tends to underestimate numbers of benefit claimants compared with other official sources (ONS 2007b: 247). The downside of pooling datasets in order to increase sample size, is the loss of ability to provide estimates of absolute numbers. The estimates of absolute numbers (e.g. UK wide claimant count) can only be provided on the basis of a single quarter LFS dataset, by utilising weight variable.

LFS variables used in this thesis comprise those measuring benefit take-up [BENFTS], types of benefits [TPBEN03(1-9)], housing tenure [TEN1, LLORD], health problems [DISCURR], age groups [AGES], working age groups [WRKAGE], gender [SEX], basic economic activity [ILODEFR], age when completed full time education [EDAGE], age of oldest child in family under 19 [AOFL19], year of arrival to the UK [CAMEYR], and person's citizenship [NATOX] (ONS 2007b).

The datasets from January 2007 till March 2008 were chosen in order to correspond with the period of qualitative fieldwork among Polish migrants in London (see Chapter 3).

Appendix 15. (LFS 2007/08), Socio-demographic characteristics of the LFS sample

Table 36. (LFS 2007/08) Selected socio-demographic characteristics of LFS respondents by citizenship

	% Aged 20-34	% Female	% Left full- time educatio n at 21 or later ³	% Having dependent children under 19 in family unit	% Arrived in 2004- 2008	Female employment rate ²	Male employment rate ²
EU2	61% ¹	44%	48%	41%	37%	79%	96%
EU7	57%	53%	26%	41%	74%	72.5%	80.5%
Poland	63%	47%	39%	43%	81%	72.4%	93.4%
EU16	21%	55%	39%	38%	18%	70%	79%
Other non-UK	37%	52%	42%	57%	32%	50%	73.5%
UK	15%	52%	18%	48%	0.1%	71%	78.5%

¹ unweighted data

² proportion of employed in total working age population (16-59 women; 16-64 men)

³ applies to working age population, excluding those still in education

Source: LFS 2007/08.