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Articles

The Representation of the Arrival of Ukrainian Refugees in the Hungarian Media in 2022

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This paper examines how the positive image of Ukrainian refugees was constructed in 2022 in the Hungarian media by analysing refugee-related news coverage across various media types, adopting quantitative content analysis. Utilising the concepts of illiberal informational autocracy and authoritarian populism, the study seeks to shed light on how the media represent refugee issues within an illiberal, authoritarian and populist context. The analysis hypothesised that, while pro-government propaganda media avoided portraying Ukrainian refugees negatively, their representations would still reflect the regime's populist and authoritarian characteristics. Our findings largely confirmed these assumptions. Pro-government media emphasised the government's competence significantly more than other media types, adopted an emotionally intense tone primarily toward Hungarian helpers and employed depersonalised representations of refugees.

Keywords: authoritarian populism, Hungary, informational autocracy, media representation, propaganda media, Ukrainian refugees

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Introduction

The war in Ukraine and the consequent influx of refugees has created a situation in the countries neighbouring Ukraine and the whole of Europe which is unprecedented since WWII. Compared to the 2015 'refugee crisis', the situation in 2022 was different in several respects – the fact that the war broke out in Europe, the number of people in need and the social composition of the refugees (primarily women and children of the same cultural, racial and religious traditions). The refugees in 2015 came primarily from regions outside Europe, often only partially from war zones. Being predominantly Muslim, they were typically culturally, ethnically and religiously different from the populations in the destination countries.

In 2015, the Hungarian government and its media constructed and pursued an unparalleled anti-immigrant, anti-refugee propaganda campaign, in which refugees arriving primarily from the MENA region and Afghanistan were presented as posing an urgent threat to the economic stability, cultural traditions and national security of Hungary and Europe (Ádám and Golovics 2022; Benczes and Ságvári 2022; Bernáth and Messing 2016; Bocskor 2018; Georgiou and Zaborowski 2017; Gerő and Sik 2020; Messing and Bernáth 2015). In contrast, the refugees fleeing the war in Ukraine have been welcomed and portrayed using a humanitarian frame. While the Hungarian state reacted with some delay to the arrival of the Ukrainians, people were quick to mobilise, with various forms of support being organised by grassroots and civil organisations within a few days (de Coninck 2023; Feischmidt and Zakariás 2019; Pettrachin and Hadj Abdou 2022; Tóth and Bernát 2022; Zawadzka-Paluektau 2023).

The context of Ukrainian refugees arriving in Hungary is further complicated by the Hungarian government's double-edged approach to the war in Ukraine. As a member of the 2 most significant Western alliances – NATO and the European Union – Hungary should theoretically support Ukraine in the war and regard Russia as the initiator and aggressor. However, the government frequently uses pro-Russian and anti-Ukrainian narratives in its communication. These narratives are either taken directly from official Russian communications or sourced from Kremlin-friendly media. This is not a novelty: clear signs of pro-Putin rhetoric have been detectable in Hungarian government communication for several years, since well before the outbreak of the war (Political Capital 2022; Patrik and Csaba 2022; Szicherle and Molnár 2022). Beginning in 2022, the Hungarian government has adopted a notably ambiguous stance on the war, consciously deploying contradictory messages. Through its propaganda media system (Ádám and Golovics 2022), it spreads explicit or implicit Russian disinformation. According to its central theme, the 'peace narrative', Hungary is the only country in the EU that supports a peaceful resolution to the conflict. The underlying narrative is that Ukraine is an oppressor of minorities, which explains and legitimises the Russian military invasion (Political Capital 2022).

This leads to the core focus of our research: How was the humanitarian representation of the refugees constructed in 2022 in the different types of media? To pursue our research motivation, we analyse the coverage of refugee-related news comparatively: in pro-government propaganda media, government-owned non-propaganda media and independent, government-critical media. We aim to contribute to understanding how the media instrumentalises the non-threatening refugee in illiberal, authoritarian and populist settings. The paper begins by introducing the theoretical framework, focusing on the concepts of illiberal informational autocracy and authoritarian populism, which explain how the media and populist media messages are used in illiberal and authoritarian contexts. It highlights some of the peculiarities of the Hungarian media landscape to gain insight into how press freedom has been restricted and into the implications for the government's production of populist media content. We then point out the major differences between the populist representations of migrants and refugees in non-authoritarian and authoritarian regimes. The following

methodological section explains how descriptive quantitative content analysis was conducted. Finally, the results and their interpretation within the conceptual framework are presented.

Theoretical framework

The media, media messages and propaganda in authoritarian and populist regimes

In populist and authoritarian regimes, the media, media messages and political communication play a central role in maintaining the power of the ruler and thus the political system through the domination of the media infrastructure and the creation of propagandistic content (Ádám and Golovics 2022; Polyák 2019). *Illiberal informational autocracy* refers to these features of regimes that are neither democratic nor open dictatorships (Guriev and Treisman 2020). The concept holds that some of today's autocratic political leaders have adapted to the new, globalised world and do not use 'traditional' violent means – or, when they use them, they try to conceal them. Instead, they manipulate information to establish and maintain their power. These systems have several typical features, such as the *mimicry of democracy* (democratic institutions such as elections or parliament, which are seemingly in place but which are more of a facade), the *emphasis on the competent leader, governance and effective performance*, the *reliance on less-privileged groups* for obtaining their votes and *restrictions on freedom of the press* that enable the *manipulation of information* (Ádám and Golovics 2022; Guriev and Treisman 2020; Susánszky, Kopper and Zsigó 2022).

Non-democratic, authoritarian systems are also often populist (Susánszky *et al.* 2022). *Authoritarian populist* regimes have a charismatic populist leader who maintains power by constantly creating external public enemies while emphasising the internal unity of 'the people'. This antagonistic divide between 'us' and 'them' is used in appeals to the people (Szebeni and Salojärvi 2022). Elections are a source of legitimation by citizens although the country is governed in a vertical-hierarchical manner through its clientèles (Ádám 2019; Szebeni and Salojärvi 2022), leaving limited or no space for opposition. The communicational creation and maintenance of 'the enemy', as well as unity, are largely achieved by using emotional language (Bartha, Boda and Szikra 2020; Forgas and Lantos 2020; Hann 2019).

The illiberal, authoritarian media landscape in Hungary

The Hungarian illiberal government consciously sought to obtain as much control over the media market as possible. As a result, freedom of the press has been deteriorating since 2010 but has not entirely been eliminated. While much of the media has gradually come under government control, a few independent or government-critical media outlets still operate (Bátorfy and Urbán 2020; Polyák 2019, 2022; Susánszky *et al.* 2022). The main strategies of the illiberal media policy include the takeover of media commissions and public service media by appointing people loyal to the government, thereby undermining their independence. They also include manipulating markets, helping with media buyouts by businesses with ties to the government and making paid government advertisements available only to loyal media outlets. Another strategy is obstructing independent journalists' access to information and public data and increasing pressure on them, which often leads to self-censorship. Finally, government propaganda controls the agenda of political issues, as it did during the migration crisis of 2015 when the government deployed securitised and politicised messages. The government exploited events related to the 2015 refugee and migrant crisis by framing it exclusively as a security threat (securitisation), thereby creating a fearful environment where the country's political leadership could not be questioned and which was suitable for mobilising their supporters (politicisation). The leadership's

control over the agenda and framings is achieved not only through loyal media but also through having power over and access to a range of communication tools, such as billboard campaigns and push polls or 'national consultations' (Bátorfy and Urbán 2020; Hargitai 2021; Kállai 2019; Polyák 2019, 2022).

In 2020, according to the calculations of investigative journalists based on ownership and control, the government dominated political (popular) dailies (75 per cent), regional dailies (100 per cent), radio (66 per cent) and television news channels (75 per cent). With other types of media, such as weekly newspapers and online news portals, independent media dominated (40 per cent).[1] In terms of audience size, it was found that television news channels are similarly distributed between government and independent media (Bátorfy and Szabó 2022). However, merely examining the number of government-controlled and independent media outlets does not provide a sufficient understanding of the functioning of the entire mechanism of control over public communication. There are other means of doing this than just controlling media outlets, which can be captured in various indicators, 2 of which are the reach of the media outlets and the amount of state support provided through paid advertisements; in both, the government has a larger share.[2] A further indicator is the level of trust which people have in each media outlet.

Research data show explicit polarisation in this respect: while people may even read, listen to or watch opposition media, they only trust the one closest to their political preference (Hann, Megyeri, Urbán, Horváth, Szávai and Polyák 2023). An illiberal government has specific and effective ways of getting its messages across. The Orbán regime has managed to build a strong propaganda machine while leaving a smaller part of the media independent. Part of this strategy is to keep some democratic institutions functioning to preserve the 'democratic façade'.

The populist media representation of migrants and refugees in non-authoritarian and authoritarian regimes

The study of the media representation of immigrants and refugees in receiving countries has been on the research agenda for decades (Benczes and Ságvári 2022; Boydstun, Card, Gross, Resnik and Smith 2014; Chouliaraki and Zaborowski 2017; Greussing and Boomgaarden 2017; Heidenreich, Lind, Eberl and Boomgaarden 2019; Hoewe 2018; Kovář 2023; Moen-Larsen 2020; Parker 2015; Pruitt 2019; Sulaiman-Hill, Thompson, Afsar and Hodliffe 2011; Urbániková and Tkaczyk 2020; Wallace 2018; Zawadzka-Paluektau 2023). Most studies point out that some degree of negative labelling and framing is a common characteristic of migrant and refugee representations in most countries. Securitised framing and a hostile approach are primarily part of far-right or populist right-wing strategies (Grande, Schwarzbözl and Fatke 2019). A series of media analyses have demonstrated how these discourses, which emanate from populist, radical, far-right actors, infiltrate mainstream public opinion (Feischmidt and Hervik 2015; Mondon and Winter 2020). It is typically tabloid, popular and commercial media that adapt and enhance these discourses. In contrast, public service and quality media deploy a more critical voice and use different interpretative frames; they adopt a more serious reporting approach, focusing on clarifying complex issues and situating events within a wider context (De Coninck, Mertens and d'Haenens 2021; Greussing and Boomgaarden 2017). For example, Greussing and Boomgaarden (2017) found in their research on the 2015 refugee crisis that tabloid newspapers focus more on the criminality aspect of refugee and asylum issues, while quality newspapers more frequently use a variety of other frames. In illiberal settings, as we discuss below, this categorisation of media types cannot be applied.

In Hungary, this research field has emerged since the 2015 refugee crisis as the populist and authoritarian regime started to thematise the refugee crisis. In previous periods, due to the small number of immigrants and refugees and the lack of political interest in the topic,[3] little research was conducted on media coverage and discourses on immigrants and refugees (Brubaker 2017; Győri 2016; Sereghy 2016; Vicsek, Keszi and Márkus 2008; Zádori 2015). The reigning illiberal, authoritarian populist political power picked up the immigrant issue

to advance its political agenda (Ádám and Golovics 2022; Bernáth and Messing 2016). As is typical of such regimes, the politicisation of immigration and the refugee question emerged from the governing political elite rather than the far right. Research on the media representation of immigrants/refugees also demonstrates that the Hungarian media – primarily outlets under government influence – has adopted the interpretation of the refugee crisis as a political problem and a threat, as well as a security issue (Barta and Tóth 2016; Bernáth and Messing 2016; Futák-Campbell 2022; Gigitashvili and Sidło 2019; Szalai and Göbl 2015; Vidra 2019).

Based on the literature, our premise is that the populist regime always uses the same or similar techniques in its communication to win the support of the people (Ádám and Golovics 2022; Susánszky *et al.* 2022). To capture what media content is produced and how the Ukrainian refugee situation is exploited by the different media types, we empirically operationalise the concept of *illiberal informational autocracy* (Guriev and Treisman 2020, 2022; Krekó 2022; Susánszky *et al.* 2022) and *authoritarian populism* (Szebeni and Salojärvi 2022). The concepts of informational autocracy and authoritarian populism highlight some of the specificities of the regime in terms of how power is maintained through (1) the creation of an image of a strong and competent leader and government, (2) the control and manipulation of information, (3) the generation of the in-group and out-groups, the fear of the 'other' and the emphasis of internal unity and (4) the use of emotional language.

Building upon these premises, our first research question examines how the positive image of refugees was constructed in 2022 and whether politically diverse media outlets represented refugees differently. Our second research question explores how the concept of the non-threatening refugee was constructed and utilised by the illiberal regime when refugees were not framed as a security or symbolic threat. By employing the concepts of 'illiberal informational autocracy' and 'authoritarian populism', we aim to contribute to the understanding of how media in illiberal populist settings instrumentalise the refugee issue.

As we have seen, the mimicry of democracy results in a situation whereby some media outlets are independent and have freedom of expression. Therefore, while the paper focuses on the illiberal and populist power's adaptation and techniques, it will also enlighten the reader on the differences between pro-government media representations and those of the independent media. In fact, using this typology is justified as most media outlets and online portals can be categorised as either belonging to one or the other based on their ownership structure and/or their attitude toward the government, as manifested in their content. This categorisation by ownership and content largely covers the highly polarised media landscape. However, in addition to the clear categories of 'pro-government propaganda' and 'independent' media, an 'intermediate' category is also included in the analysis. It is an online portal with the largest readership, whose ownership structure puts it in the pro-government category but which had some independence in terms of content production (the 'government-owned non-propaganda' media).

Methodology

Sampling and analysis

The media analysis explores the representation of Ukrainian refugees in different media types using descriptive quantitative content analysis combined with qualitative steps in the iterative coding process. The timeframe of the analysis starts at the outbreak of the war (24 February 2022) and lasts until the inauguration of the new president of Hungary (14 May 2022). This period incorporates the national elections on 3 April 2022, in which discourses about the war in Ukraine and refugees were high on the agenda of politicians running for office. The study aims to give a quick snapshot of the representations right after the outbreak of the war.

The selection of the media sources took into account the combination of the *size of the audience/readership*, the *ownership of the media source* and its *significance for creating narratives*. In identifying the relevant sources, we also considered the results of research that indicate that the majority of the population gets information from (one of the) television channels rather than from print or online media.[4] Considering these aspects, we selected the most popular online media platforms and included 3 TV channels.[5]

As the public-service media and some specific commercial, printed and online media outlets operate under strong government control, our primary typology reflected the ownership structure and content thus produced. We used the category of 'pro-government propaganda outlets' – government-controlled ownership and content (propaganda) – and 'independent media' – no government control of ownership and content (independent). The media landscape is somewhat polarised, with clear pro-government and independent media outlets. However, the most popular and widely read online portal at the time of the analysis, index.hu, had to be categorised as an 'intermediate' category (government-controlled ownership but not content), as index.hu was independent but was bought up by an owner close to the government in 2020. The editorial staff resigned as a result of the transaction. The newly recruited editorial staff were trying to resist political pressure. According to investigative journalists, the government still let index.hu produce its own content albeit with some restrictions on covering specific topics.[6] The grouping of the media types is shown in Table 1.

Table 1. Summary of the selection and categorisation of media sources included in the content analysis

Pro-government propaganda media	Independent, government critical	Government-owned non-propaganda media
magyarnemzet.hu (N=75)	telex.hu (N=58)	index.hu (N=112)
origo.hu (N=33)	24.hu (N=48)	
TV2 news (texts) (N=40)	RTL news (texts) (N=40)	
M1 news (texts) (N=72)		
Total: (N=220)	**Total: (N=106)**	**Total: (N=112)**

As for the audience of the selected media, we identified the media sources that have the largest influence, either because they have the largest audiences in their market or because they are a main (re)producer of governmental narratives.[7]

When constructing the dataset, we used the search term 'refugee' ('*menekült*') in all the media sources, as our focus was explicitly on Ukrainian refugees. This resulted in a total of 2,243 articles. Since we used manual coding, we needed to reduce this dataset. We applied the *constructed week sampling* method (Riffe, Lacy, Fico and Watson 2019),[8] which resulted in a total of N=438 news items.

The content of the news items was coded manually with the participation of 3 coders. Manual coding was chosen over automated coding in order to make our coding process flexible and adaptable. Since the theme of the exclusively positive refugee was entirely new in the media, we employed an iterative approach to developing new codes as we progressed through the analysis. This approach allowed us to capture nuanced, context-specific details. Additionally, the size of our dataset did not warrant the need for automated coding, making manual coding the more appropriate choice. The codebook was prepared in a multi-step, iterative process with the active participation of the members of the research team. We included several codes from earlier codebooks (Bernáth and Messing 2016) and introduced new ones adapted to the current situation.

All articles were coded;[9] one article could have multiple codes within the same category. The data were analysed using SPSS. Frequency distributions of codes were calculated for all media types. Concerning the

coding process, we first identified the dimensions of the media content that were relevant to the 2022 refugee situation. The second step in the process was to apply the coding to our conceptual framework.

Coding

In our analysis, we operationalise the concepts of informational autocracy and authoritarian populism by juxtaposing codes that refer to different features of the regime. The components of the analytical concepts and the corresponding variables are shown in Table 2.

Table 2. Selected components of the analytical concepts and the corresponding variables

Components of concepts	Variables in the media content analysis
Competence of the leader, the government and government politics	• Topics (those which refer to the importance of the role of the government and the state, a prevalence of these topics) • Views on the refugee policies of the state (positive, negative, neutral) • Actors and speakers (prevalence of mentions of government, government actors and state institutions) • Presence/lack of images of government politicians
Manipulation of information	• Terminology used to refer to refugees (refugees vs illegal migrants) • Framing • Personalisation vs non-personalisation of refugees in narrative and visual representations • Voice given or not given to refugees • Presence and lack of the topic and images of the war
Internal unity, 'us'	• Topics (any referring to unity): Sub-Carpathia, helpers • Views about refugee helpers • Actors and voice given to refugee helpers
Emotional political communication	• Emotional intensity of representations • Subject of emotional representation

The first dimension the study explored was the *competence of the leader and the government* (which characterises illiberal informational autocracy), which was captured through *topics* such as the prevalence of the *refugee policies of the state*[10] and *opinions about these policies*[11] as well as through the *prevalence of government actors and state institutions* as actors and speakers.[12]

The second dimension was *manipulation*, which was captured through *dehumanised representations*; employing dehumanisation influences how people perceive refugees and formulate their views about them (Bruneau, Kteily and Laustsen 2018; Esses, Medianu and Sutter 2021). Therefore we identified variables which could be regarded either as dehumanising or as the opposite – humanising. First, the *labelling or the terminology* describing refugees ('refugee' vs 'illegal migrant') and the *framings* that were used (humanitarian, security, economic and cultural) were regarded as explicit indications of dehumanisation versus humanisation.[13]

There were, however, more implicit indicators. The representation could be interpreted as more humanised if refugees were personalised in some way (Chouliaraki and Zaborowski 2017; Doufesh and Briel 2021). This could appear in *personal stories (topics)* or when *voice is given to refugees* to let them speak on their own behalf.

Apart from these factors, manipulation occurs the most effectively through visual images. The visual representation of refugees is crucial in shaping emotions and shifting public attitudes in either a positive or negative direction (Sohlberg, Esaiasson and Martinsson 2019). Visuals may be either stigmatising or destigmatising due to the strong impacts which images can have (Bullinger, Schneider and Gond 2023). Also, images are very effective at conveying and magnifying the humanised or dehumanised messages used in immigrant and refugee narratives. There are some common techniques that help to achieve the desired impact: humanised representations use close-ups and tracking shots, while a biased selection of images contributes to the visual framing whereby complex realities are reduced to simple messages (Hellmueller and Zhang 2019; Martikainen and Sakki 2021). The scholarly literature identifies that showing groups or crowds of people without the opportunity to identify their faces enhances the threat of the refugee and security framing, as occurred with the visual representation of the refugees in 2015 by the Hungarian propaganda media (Bernáth and Messing 2016; Chouliaraki and Stolic 2017). *Dehumanised* vs *humanised* portrayals were traced depending on how refugees were portrayed (alone or in crowds) and whether the war from which they were fleeing was referenced in the context of the refugee situation.

Emphasising *internal unity/'us'* was captured in variables referring to the *people mobilised to help*[14] as well as the topic of *Sub-Carpathia*. Helping refugees did unite various segments of society, therefore it seemed justified to use variables related to *helpers* (topics of refugee helpers, opinions about refugee helpers, church vs civil helpers) to reveal how important the aspect of internal unity was in the different media types. Sub-Carpathia, a region of Ukraine home to ethnic Hungarians, is relevant in the national(ist) consciousness as representing the ethnic bonds of all Hungarians.[15]

For populists, the use of emotional language is crucial, so we explored which *emotional representations* of refugees prevailed. We assessed the *emotional intensity of the representations* and the *subject of emotions* (emotional language referring to refugees or helpers) in the different media types. This assessment had two parts. First, articles were coded as either positive, negative or neutral to refugees and the refugee situation regarding their emotional representation (direct emotional language or tone was coded as either positive or negative and, in the lack of such, coded as neutral). Second, the 'subject of emotions' was also analysed, revealing what the emotional representation referred to: either the situation of the refugees or praise for the efforts of the helpers, emphasising the devotion of the Hungarian people to the cause.

The dimensions above were studied to reveal the techniques used by pro-government media and compare them with the representations of the refugee situation in independent and government-owned non-propaganda media. We examined the prevalence of these dimensions in the different media types. Our assumption was that the propaganda media would be significantly different from the two other types.

Results

In the following section, the results of the content analysis are presented. Table 3 shows the prevalence of variables according to media type. These variables are grouped using the conceptualisation of informational autocracy and authoritarian populism. The components of the concepts are presented – the *competence of the government*, the *manipulation of information*, *internal unity* and *emotional and political* communication – while the differences between pro-government, independent and government-owned non-propaganda media are highlighted.

Table 3. Prevalence of variables according to media type (per cent) (N=438)

	Pro-government propaganda media	Independent, government-critical media	Government-owned non-propaganda media
Topic *(in % of news items)*			
Arrival + travel of people fleeing war in Ukraine	55	57	55
Hungarian government's refugee policy	39	14	17
Domestic and foreign politics	30	18	10
Personalisation of refugees (personal accounts)	6	19	8
Sub-Carpathia	14	2	8
Helping for arriving Ukrainian people	22	10	17
War	32	19	31
Ukrainian refugees in other countries	15	20	22
Integration of refugees	15	12	13
Terminology used in relation to the Ukrainian refugee crisis *(in % of news items)*			
Refugee	79	77	64
Illegal migrant	2	1	1
Mixed/Other	4	1	2
Frames *(in % of news items)*			
Humanitarian	90	88	70
Security threat	3	2	-
Economic threat	1	-	-
Cultural/identity threat	-	-	-
None/not identifiable	6	9	31
Opinion about state refugee policies *(% of news items)*			
Positive	57	7	21
Negative	0	6	3
Neutral	1	3	8
No opinion expressed	45	84	69
Opinion about helpers *(% of news items)*			
Positive	36	15	27
Negative	-	-	-
Neutral	-	-	1
No opinion expressed	64	85	73
Actors *(% of actors)*			
Government actors	32	12	16
Foreign politicians and international organisations	7	17	8
Political opposition to the regime	2	1	2
Locals	6	8	5
Refugees	2	15	9
Civil helpers	11	12	15
Church helpers	7	0	6
Experts and celebrities	5	3	7

Speakers *(% of speakers)*			
Government actors	35	16	14
Foreign politicians and international organisations	31	49	46
Political opposition to the regime	3	2	2
Locals	4	2	3
Refugees	2	9	7
Civil helpers	5	6	5
Church helpers	5	1	3
Experts and celebrities	10	13	9
Emotional representation *(% of news items)*			
Emotionally intense	44	20	36
Subject of emotional representation *(% of news items presenting emotions)*			
Refugees	58	92	74
Helpers (Hungarians)	19	0	11
Visual images *(% of news items)*			
Visual images attached to the text	71	50	61
Content of visual representation *(% of news including visuals)*			
Politicians	33	2	23
… of whom foreign politicians and international organisations	5	13	8
Refugees	49	74	46
War	7	25	31
Humanised/dehumanised visual representation (number of people) *(% of items presenting visuals about refugees) N= 322*			
Crowd	40	47	70
Small group	55	86	72
Individual	20	24	13

The competence of the government and government politics

This dimension was designed to reveal how frequently the competence of the government was emphasised in relation to the different types of media, the topics covered and the speakers, actors and visuals presented.

The topic the most frequently appearing in all media types was the *arrival and travel of people fleeing the war in Ukraine*. While the most frequently represented topic was the same in all media types, the prevalence of the other topics involved important and meaningful differences. The second most frequently recurring topic in the propaganda media was the Hungarian *government's refugee policy* (39 per cent, as opposed to 14 per cent and 17 per cent in the independent and government-owned non-propaganda media). The propaganda media not only talked more about the state's refugee policies but also had a dominantly positive view (57 per cent) of the state's efforts concerning how the refugees were supported. In comparison, the independent and the government-owned non-propaganda media either did not deal with it (84 and 69 per cent) or were much less positive (7 and 21 per cent). *Domestic and foreign politics* was the third most prevalent topic in the propaganda media (30 per cent), while this was less discussed in the other two forms of media (18 and 10 per cent).

Concerning speakers and actors, the propaganda media was dominated by government representatives (35 and 32 per cent). In contrast, the independent and government-owned non-propaganda media featured representatives of the government less frequently (16 and 14 per cent of speakers and 12 and 16 per cent of actors, respectively). The speakers the most frequently appearing in the independent and government-owned non-propaganda media were foreign politicians and international organisations (49 and 46 per cent), who also figured as the second-most-important speakers in the propaganda media (31 per cent). Political opposition to the Orbán regime was almost non-existent in the reporting about refugee matters in all three types of media (3, 2 and 2 per cent).

The visual representations corroborated what the textual analysis revealed. The governmental media included politicians in their images significantly more frequently (33 per cent of the articles had images) than the independent media (2 per cent). The government-owned non-propaganda media was more similar to the propaganda media in this respect (23 per cent).

The manipulation of information

Manipulation was explored by looking at terminology and framing, the level of personalisation of the refugees in topics and visual representations.

The first aspect of the manipulation of information is the labelling or the *terminology used for Ukrainian refugees* in the media. As expected, the Ukrainians fleeing the war were exclusively presented as genuine refugees in all media types (79 per cent in propaganda, 77 per cent in independent and 64 per cent in government-owned non-propaganda media). In the 2022 media coverage of Ukrainian refugees, the term *illegal migrant* appeared only marginally and exclusively concerning immigrants arriving from other – Asian, MENA and African – regions.

Concerning *framing*, the 2022 refugee crisis was dominantly framed as a humanitarian issue (90 per cent in propaganda, 88 per cent in independent and 70 per cent[16] in government-owned non-propaganda media).

The personalised representations of refugees and their stories were covered more intensively in the independent than in the propaganda media (19 vs 6 per cent, respectively). The government-owned non-propaganda media was similar to the propaganda media in this respect (8 per cent). Refugees were *represented* and *given voice* more frequently in the independent (15 and 9 per cent) than in the propaganda media (2 and 2 per cent). Their portrayal in the government-owned non-propaganda media was between the latter 2 types (at 7 and 9 per cent).

We also looked at the visual representations of the refugee situation. The propaganda media used visuals significantly more frequently (71 per cent) in their reports than the independent media outlets (50 per cent). Visual images were also analysed to see whether refugees were shown as individuals/in small groups or large groups (crowds). Most of the reports with visuals attached featured small groups (families) in all 3 media types. When crowds were shown, they were the most frequently images of Ukrainians arriving in Hungary, descending from the train or queuing in train stations, at border crossings or at helpdesks.

A further aspect of the analysis of visual representations was how images of the war appeared. A significant difference in the portrayal of the armed conflict was discovered. The independent and government-owned non-propaganda media showed images of the war (arms, fighting, destroyed buildings, etc.) in 25 and 31 per cent of reports, while such visuals were almost completely lacking in propaganda media (7 per cent). When the war was used as a topic (in the narrative), it was not disregarded; it appeared in 32 per cent of the propaganda media news items (and 31 per cent in government-owned non-propaganda media) as opposed to 19 per cent of independent media stories.

Internal unity, 'us'

Emphasising the unity of the people, creating a narrative of 'us' versus 'them', is a genuine component of authoritarian populist regimes. During the 2022 crisis, despite the ambiguous government communication about the war, the Ukrainian refugees were not presented as an enemy. There were two sets of variables through which the emphasis on the in-group was captured; one was the use of the topic of Sub-Carpathia and the other was the representation of 'the people', who were the refugee-helpers in this case.

The results confirm that the propaganda media paid much more attention to the *Sub-Carpathian region* and the people there or from there than the independent media (14 vs 2 per cent, respectively). The government-owned non-propaganda media also paid more attention to this topic than the independent media (8 per cent).

Our data showed that the topic of *helping Ukrainian people who were arriving* was not very prevalent in any of the media types; it was the fifth most prevalent political topic. Nonetheless, it was more frequently discussed by the propaganda and the government-owned non-propaganda media (22 and 17 vs 10 per cent independent). The results of the *opinions about refugee helpers* revealed that, while helpers were only seen positively, the propaganda media expressed positive views more frequently (57 as opposed to 7 per cent in the independent media). The government-owned non-propaganda media was also more positive than the independent but much less so than propaganda (21 per cent).

Emotional political communication

The presence or absence and the intensity of emotional and political communication were revealed through the variables that directly dealt with emotions. One of the variables measured whether the refugee issue was represented in an *emotionally intense* or relatively neutral manner by using words, adjectives, verbs and phrases referring to strong emotions. It was found that the use of emotionally intense representations in propaganda and government-owned non-propaganda media was significantly greater than in the independent media (44 and 36 per cent vs 20 per cent).

Relying on our close reading and pre-tests, another variable was created to show what the *emotional representations referred to*: the situation of the refugees or praising the efforts of the aid providers and emphasising the devotion of Hungarians to the cause. As the results show, the situation of the refugees was primarily represented in an emotionally intense way in all types of media (in propaganda, 58 per cent; in independent, 92 per cent; and 74 per cent in government-owned non-propaganda). Explicit praise for the Hungarian people as helpers was much less emphasised but was more typical of the propaganda and government-owned non-propaganda media (19 and 11 per cent, respectively, vs 0 in independent media).

It was found that the propaganda media applied a significantly more emotional type of representation than the independent media (44 vs 20 per cent), partly confirming the assumption that the illiberal populist media and political communication are keen to evoke emotions, most probably to mobilise people for political purposes (Bartha *et al.* 2020; Forgas and Lantos 2020; Hann 2019). The government-owned non-propaganda media used emotional representation; however, it was still much less typical than in propaganda media (36 per cent). Two more important findings gave further insight into how emotional politics works. The 'greatness of Hungarians' was emphasised with an emotional tone in the propaganda media (19 per cent as opposed to 0 in independent media) when representing refugee helpers.

Discussion and conclusion: populist and non-populist representations of the Ukrainian refugees in the illiberal authoritarian political context

The aim of our paper was to examine the distinctive characteristics of media representations of the 2022 refugee crisis within the context of Hungary's illiberal, authoritarian and populist political system. The regime has a specific approach to the media and media messages. Because of its illiberalism, it controls a large part of the media landscape and the media content produced to effectively convey its populist messages. We have focused on exploring how the media operates in an illiberal populist environment in relation to non-demonised and non-securitised refugees.

Our first research question investigated how the positive portrayal of refugees was shaped in 2022 and whether media outlets with diverse political orientations presented refugees in distinct ways. The second question explored how the concept of the non-threatening refugee was framed and leveraged by the illiberal regime, especially when refugees were not depicted as a security or symbolic threat.

Using the concept of *illiberal informational autocracy* (Guriev and Treisman 2020, 2022; Krekó 2022; Susánszky *et al.* 2022) and *authoritarian populism* (Ádám 2019; Szebeni and Salojärvi 2022), we aimed to explore how the competence of the government, its political representatives and government policies on the one hand and the framing and manipulation of information on the other, had been asserted in the media representation of refugees. We also examined other categories that indicate how the regime's political representatives constantly refer to the internal unity of the nation, as well as how much they adopt emotional political communication (Bartha *et al.* 2020; Forgas and Lantos 2020; Hann 2019). By utilising these concepts, our goal was to contribute to the understanding of whether and how the media, in illiberal populist contexts, instrumentalise the refugee issue.

In this paper, news coverage of refugees in three types of media, differing in ownership and freedom to produce content, was studied using quantitative content analysis. The three types were 'pro-government propaganda', 'government-owned non-propaganda' and 'independent, government-critical' media. We hypothesised that, although the pro-government propaganda media did not create a negative image of Ukrainian refugees, the representations still reflected the political characteristics of the populist and authoritarian regime as framed by the concept of *illiberal informational autocracy* and *authoritarian populism.* To explore these features, we operationalised the two concepts and used some of their characteristics in the coding scheme – (1) the competence of the leader, the government, and its policies; (2) manipulating information; (3) promoting internal unity through an 'us vs. them' narrative; (4) and employing emotional language.

While our assumption was that the 2022 refugee situation was very different from the 2015 situation, based on our findings we argue that some form of politicisation and dehumanisation still characterised the regime's communication but in a more implicit way. As the results have shown, (1) the overemphasis on government actors and their deeds and speeches created the context for the refugee situation. That is to say, the propaganda media framed the refugee question primarily as a political question, making it the focus of its political agenda. The independent and the non-propaganda media focused much less on political actors, their speeches and deeds and even less on government politicians.

(2) Manipulation was operationalised by what framing (humanitarian or others) was used, and by whether refugees were humanised or dehumanised on the one hand – or personalised or non-personalised on the other. We found that refugees were not dehumanised, demonised or negatively labelled because the government did not aim to evoke fear and frustration in the population; no negative labels or framings were used in the pro-government media, however, refugees were largely represented as non-personalised. Dehumanisation and non-personalisation are not the same but may serve similar purposes (Chouliaraki and Zaborowski 2017; Doufesh and Briel 2021):

to prevent empathy towards the refugee. In contrast, the independent media frequently utilised personalised representation by documenting and reporting personal stories and images. The analysis also showed that the pro-government propaganda media largely excluded, whereas the independent and non-propaganda media included, images of the war. This omission visually separated the refugees' arrival from the realities of war.

This non-personalisation in the pro-government media went in parallel with (3) emphasising the unity of the nation. Our analysis revealed that the propaganda media was keener on emphasising the unity of the people and, through the representation of the Sub-Carpathian region, the ethnic bonds of the nation. The refugee helpers were also more frequently represented in the propaganda and government-owned non-propaganda media in a positive way than in the independent media.

(4) Emotional political communication, as found in the analysis, was indeed more important for the propaganda than for the independent media; the refugee situation was addressed in a more sentimental way. However, it was interesting to see that these emotions were expressed either towards 'us' (host-country citizens) who helped 'them' (refugees) or the refugee situation in general – in line with the humanitarian framing – rather than towards individual refugees (i.e., indicating the non-personalisation of refugees). The refugee situation was a cause to which people could feel attached although refugees were not personalised or individualised.

All in all, emotional political communication in the illiberal populist media meant evoking sentiments towards a cause or 'us' but much less towards refugees. Refugees were not a dehumanised or demonised outgroup in the 2022 situation in the populist approach; nonetheless, the fact that they were not individualised prevents or decreases the likelihood of any emotional attachment to them. It could be said that they are not an explicit outgroup but an implicit one. Independent media and, to some extent, non-propaganda media used different representations: the refugee issue was framed much less as a political matter and more as a humanitarian one. Government and government politicians were not portrayed as significant actors; instead, refugees were personalised and emotions were directed towards the refugees rather than the helpers.

In conclusion, we can say that, as suggested by the literature on *informational autocracy* and *authoritarian populism*, the government was the central focus of the representations, with its competence being overemphasised in the propaganda media. This is, however, true in immigrant and refugee media representations in general and was especially true during the 2015 crisis in Hungary. In other words, this dimension alone does not give much insight into the specificities of the 2022 situation. However, the accentuation of the importance of the government created a political context in which the in-group and its activities – helpers and helping refugees – were presented with emotional intensity. This aspect was a new and different element compared to the 2015 crisis, when helpers were represented negatively or were invisibilised (Ádám and Golovics 2022; Benczes and Ságvári 2022; Bernáth and Messing 2016; Bocskor 2018; Georgiou and Zaborowski 2017; Gerő and Sik 2020). The manipulation of information was also present in 2022, albeit implicitly: refugees were not dehumanised – as they were in 2015 – but were, instead, depersonalised. As we have observed, although the political context has changed and Ukrainian refugees were not perceived as enemies or threats, the illiberal regime still presented a more ambiguous image of them compared to the independent or government-owned non-propaganda media.

In summary, in 2022 the government aimed not to incite moral panic – as it had in 2015 – but, rather, to accommodate refugees. To achieve this, positive imagery was employed. However, as our research revealed, government media continued to instrumentalise Ukrainian refugees by emphasising its own political agenda, such as showcasing the government's competence and promoting national unity in assisting the refugees. This approach contrasted with the more humanitarian focus evident in independent and non-propaganda media.

Notes

1. https://atlatszo.hu/kozpenz/2020/08/07/grafikonokon-es-diagramokon-mutatjuk-hogyan-alakult-at-a-magyar-media-az-elmult-tiz-evben/.
2. https://atlatszo.hu/kozpenz/2020/08/07/grafikonokon-es-diagramokon-mutatjuk-hogyan-alakult-at-a-magyar-media-az-elmult-tiz-evben/.
3. Hungary was not an important destination for migrants until 2015. However, it has long been a destination for ethnic Hungarians from neighbouring countries such as Romania, Ukraine, Serbia and Slovakia. This migration was encouraged by government policies supporting Hungarian minorities abroad, including the provision of dual citizenship starting in 2010. Migrants from neighbouring countries, particularly Romania and Ukraine, moved to Hungary for work or education. Hungary also received asylum-seekers from conflict zones such as the Balkans (e.g., the Yugoslav Wars in the 1990s). Ethnic Hungarian migration had political significance as it was seen in the conservative political narrative and politics as a tool for nation-building, electoral strategy and regional influence.
4. https://media1.hu/2021/06/29/az-orszag-kozel-fele-egyaltalan-nem-olvas-hireket-a-neten-az-is-kider ult-kik-nezik-a-kozmediat-a-tv2-t-es-az-rtl-t/.
5. We included the shortened text format of the news from the TV channels' news reels.
6. https://www.direkt36.hu/az-index-ostromanak-szinfalak-mogotti-tortenete/.
7. https://e-public.gemius.com/hu/rankings/5991.
8. This means that, from the 3 months included in the dataset, 1 day of the week from each month was selected randomly: e.g., from all the Mondays in 1 month, 1 Monday was randomly selected and all articles from that day were entered into the reduced dataset. The same selection method was applied to every day in every month.
9. To guarantee the validity of the coding, intercoder reliability was measured by the coding of every fifth article by multiple coders.
10. We used an inductive process to identify the topics that fit the 2022 refugee situation. The following topics were found: 'domestic and foreign politics', 'the war', 'Ukrainian refugees in other countries', 'integration of refugees', 'personalisation of refugees (personal stories and accounts)', 'facts about the arrival and travel of the refugees', 'helping people arriving from Ukraine', 'the refugee politics of the government' and 'the sub-Carpathian region' (ethnic Hungarians living in the sub-Carpathian region).
11. The opinions expressed in the articles on state refugee policies were coded as either positive or negative if the opinion was clear and direct; otherwise as neutral.
12. As studies show, while refugees are portrayed as either victims or threats, their voice is hardly heard. It is mainly politicians who are portrayed in the media. Civil actors are not given much voice. We wanted to explore whether the same patterns were at play regarding Ukrainian refugees.
13. Each frame included a description containing keywords and expressions. An article could contain multiple frames.
14. In 2015, helpers were depicted in the pro-government media as part of the 'Soros network', working against the interest of Hungary and the Hungarian people, which was one of the main tropes of the successive hate campaigns launched by the government (Gerő and Sik 2020; Sik and Simonovits 2019). In 2022, the narrative on refugee helpers and the extent of the actual mobilisation of the people were very different.
15. After World War I, Hungary lost a significant portion of its territory, along with the populations residing there, many of whom were ethnic Hungarians. These regions – including Sub-Carpathia – have since remained a central element of Hungarian national identity and nationalism: the unity of the nation

includes ethnic Hungarian in the neighbouring countries who are considered as an integral part of the nation. Since the regime change, it has always been right-wing, conservative parties that have referred to the Hungarian nation as encompassing all ethnic Hungarians, regardless of their country of residence or citizenship.

16. Some 30 per cent lacked any clear framing.

Conflict of interest statement

No conflict of interest was reported by the author.

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The Diasporisation and Transnationalism of New Hungarian Migrants and the Related Potentials of Hungarian Diaspora Policy

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This paper attempts to discover whether or not there have been diasporisation processes unfolding among recent Hungarian migrants. Based on the results of an online survey, 3 distinctive groups were identified among Hungarian migrants: a group undergoing a process of diasporisation, a transnational emigrant group with strong political interest and a group that is characterised by indifference in terms of diasporisation and transnationalism. The statistical analysis indicates the presence of these 3 distinctive groups, which allows for a comprehensive analysis of diaspora policy consequences. The paper first introduces a theoretical framework in which Hungarian diaspora communities and diaspora policy can be interpreted. Second, it provides an overview on Hungarian diaspora policy and emigration trends. Third, it offers an analysis of quantitative data on Hungarian migrants and presents a potential typology of Hungarian emigrant groups. Finally, it interprets the results in the context of possible diaspora policy outcomes.

Keywords: migration, emigrants, diaspora, diaspora policy, transnationalism

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Introduction

The Hungarian emigrant population abroad consists of extremely diverse and heterogenous groups in terms of the motivation for emigration, the length of stay abroad and the Hungarian heritage cultivated by them. It incorporates recent emigrants with effective ties to Hungary as well as further generation diaspora members with symbolic ethnicity (Gans 1979). Based on the available statistical data, the number of emigrants has significantly risen in the past decade. The number of Hungarian emigrants is challenging to quantify due to methodological reasons and to the fluidity of contemporary migration strategies as well. Emigrants appear in domestic statistics only if they officially report their absence; however, only a small fraction of them do so, therefore home-country statistical sources are not reliable to estimate the number of emigrants. Furthermore, population surveys (i.e. census) in Hungary do not include those who have moved abroad with their entire household, so they are only relevant to the analysis of the emigrant population if there are family members left behind. Host-country mirror statistics are other sources through which to assess the number of Hungarian emigrants: those who register and intend to stay on for at least 1 year are included in host-country statistics. However, free movement within the EU resulted in fluid labour-migration patterns: many migrants move only temporarily or commute between home and host countries. These migrants thus also often remain invisible to both national and host-countries statistics. Taking into consideration all the methodological challenges, Gödri (2018) provided an estimate for the number of Hungarian emigrants and found that their number was 637,000 in 2017, which equates to 6.6 per cent of the Hungarian population.

This paper attempts to discover whether there have been diasporisation processes unfolding among recently emigrated Hungarians which could lead to the establishment of new diaspora communities. The analysis explores the complex processes of diaspora formation, focusing on Hungarian emigrants – and especially on those who have left the country in the past 25 years. The ambiguous and politicised social narratives encompassing migration, besides the governmental attention devoted to integrational and identification opportunities offered by diaspora policies, place social mobility into an extremely vibrant context for emigrants who left the country in the previous decades. Data about their reactions, attitudes and strategies may significantly contribute to the interpretation of recent and present social discourses and processes. For this reason, this research paper analyses the impacts of post-2010 Hungarian diaspora politics on emigrants, aware of the fact that observants represent only a portion of the governmental policies' main target groups.

The research findings suggest that, among recent emigrants, features of diaspora can be identified based on Brubaker's (2005) typology: the individuals maintain relatively solid cultural–ethnic relations with the home state and have, at the same time, integrated into the host society. Based on the results of an online survey, 3 main migration groups were identified: a group undergoing a process of diasporisation, a transnational group with strong political interest and a group that is indifferent to diaspora initiatives and transnational practices. The latter group was labeled as the 'unengageable migrants', as they do not resonate with potential homeland engagement. The statistical analysis indicates the presence of these three distinctive groups, which allows for a comprehensive analysis of diaspora-policy consequences.

The paper first introduces a theoretical framework in which Hungarian diaspora communities and Hungarian diaspora policy can be interpreted. Second, it provides an overview of the history of Hungarian diaspora policy, as well as the emigration trends and a potential typology of Hungarian emigrant groups. Finally, it offers an analysis of quantitative data on Hungarians abroad – gained from an online survey – and interprets the results in the context of possible diaspora-policy outcomes.

Theoretical considerations on diaspora and diaspora policy

From a sociological perspective, diasporas have received considerable academic attention since the 1960s. Diaspora politics – i.e. the home country's attempts to engage its diaspora groups (in certain scenarios, even the 'construction' of such groups) – has only been subject to academic scrutiny in the past 25–30 years. The increased attention devoted to the subject may be due not only to growing migration inflows but also to the significant development of the telecommunication sector, which has resulted in stronger connections between those who emigrated and the home-country community. Thus, transnationalism has become more accessible and of a higher quality, which has presented new challenges for home-country diaspora policies too. These policies have largely been based on the strengthening and increasing visibility of migrant and diaspora communities. At the same time, in some cases, it has been the diaspora policy of the home country itself that catalysed diaspora identification in the mentioned communities.[1]

According to Brubaker (2005), the academic and public interest in diaspora groups has intensified over the past 3 decades to the point where the use of the term 'diaspora' has become rather confusing. While it is true that no consensual definition of the term has been established and its use continues to be diffuse, there are 3 key elements that seem to be inextricably linked to the concept of diaspora. These 3 elements are (1) dispersal, i.e. the forced or voluntary absence from the country of origin; (2) the connection with the country of origin, which can manifest itself in the real or desired idea of returning home and also in the maintenance of intense cross-border ties; and finally, in (3) the formation and maintenance of boundaries with other groups, which serves the goal of identity preservation (Brubaker 2005; Faist 2010).

As international migration intensified, the conceptual framework of diaspora increasingly began to be substituted by the framework of transnationalism to describe the formations and phenomena that international migration produced. While there have been convincing attempts to define both terms of diaspora and transnational formations, as Faist (2010) points out, the literature did not succeed in substantially delineating the 2 concepts the one from the other. A useful clue to the use of the 2 terms is that, while the notion of diaspora carries connotations such as boundedness and demarcation, the transnational approach tends to emphasise the fluidity and non-demarcation that is so inherent in the migratory experience (Lacroix 2007). In a similar fashion, Féron and Voytiv (2021) argue that migrant groups develop into a diaspora through organisational and imaginative elements that serve as the foundations of a common identity and linkages to the homeland. Accordingly, diaspora research focuses more on groups and communities who seek to preserve their national, cultural and religious specificities, while transnationalism research examines all kinds of social formation, including transnational professional networks or social movements. In our empirical research, later in the paper, we strongly build on these concepts when we use the term 'diaspora' for emigrant formations that show some level of diaspora institutionalisation and the term 'transnational' for migrant individual's transnational practices. In the paper, we refer to the process of becoming a diaspora through institutionalisation – and community organisations as diasporisation.

Diaspora policy may be defined as government initiatives, programmes, institutions or legal regulations that aim to address, support and engage with diaspora communities. Gamlen's (2006) typology of diaspora policy reflects the main objectives of diaspora policies. He has conducted a comprehensive research on diaspora engagement policies in 70 countries and identified 3 main categories: capacity-building, rights extension and obligation extraction policies.

The 2 main pillars of capacity-building policies rest on symbolic nation-building and institutionalisation. According to Gamlen (2006), the home state first discursively construes the diaspora. This may involve rhetorical elements such as the heroisation of emigrants – placing emphasis on their role in national independence – or the paternalist responsibilities of the home state towards the diaspora communities. In the

construction of national identity and its extension to diasporic communities, cultural programmes and language teaching – as well as support for mother-tongue media – all play an important role. The other tool of capacity-building – namely, the founding and support of institutions – is essential in making diaspora groups governable. While symbolic nation-building creates a 'relationship of communication', institutionalisation enhances the state's objective capacity (Gamlen 2006: 10) over the diaspora. Various institutional forms may be effectively used for this purpose: diplomatic consulate networks, governmental bodies dedicated to diaspora management (ministry, state secretary, office, etc.) or the already-existing diaspora institutions.

Policies aiming to extend rights to the diaspora may be categorised in 2 subgroups: the political incorporation and the extension of social and civil rights to the diaspora. The former refers to the extension of citizenship to the diaspora, which may have several underlying motives. The most often, it is the prospect of appealing to diaspora groups upon which they may be willing to further economic growth in the home state via remittances and investments (Leblang 2017). At the same time, Gamlen (2006) highlights that, while the extension of citizenship is considered as a common diaspora-policy tool, the extension of unconditional voting rights to the diaspora is less frequent. As Gamlen emphasises, home states 'economise' the rights extended to diaspora communities. This could be illustrated by some states' restriction of extraterritorial voting rights. Civil and social rights may involve the mediation of labour or labour protection (e.g. health insurance), as well as the easing of administrative burdens for those expatriates who return to the home country.

The third model, extracting obligations, may be divided into 2 subtypes according to Gamlen: the exploitation of the diaspora's economic resources and of its political resources. Gamlen refers to the former category as investment policy; however, it is more suitable to address this type as economic benefit policy, as it is not solely about inward investment flows into the home country. These policies include 'brain drain taxation' – e.g. retracting taxes from highly qualified expatriates (through formal or informal channels), incentives for remittance and investment (through the reduction of transaction costs) and various knowledge-transfer or brain-circulation programmes (e.g. the inclusion of highly qualified diaspora in home-country education, training programmes and innovative initiatives). The extraction of the diaspora's political resources may refer to the openness of the home country to reflect on diaspora groups' needs but may also materialise in diaspora lobby promotion activities in the receiving state in favour of the sending country.

In order to be able to interpret Hungary's diaspora engagement practices in Gamlen's framework, the paper firstly covers governmental diaspora policies and, secondly, the target group of diaspora policy through macro statistical and quantitative methods.

Post-2010 diaspora policy

At the beginning of the 2010s, migration from Hungary started to increase. This contemporary wave of emigration has exclusively been framed by the opposition parties, specifically in a 'national loss' narrative, while the government has not addressed the social process either discursively or at a policy level. While it did not start to engage contemporary migrants, the Hungarian government did introduce a comprehensive diaspora policy, only for the most part focusing on the older, more-established diaspora communities that had left the homeland mostly for political reasons after WW2 and after the 1956 revolution. This happened in line with the Fidesz government's nationalistic agenda in the realm of external nation-building (Pogonyi 2017).

The launch of a dedicated Hungarian diaspora policy can be considered as the foundation of the Hungarian Diaspora Council in 2011, which serves as the coordination forum for the representatives of the Hungarian diaspora communities and the Hungarian government. This has been followed by other governmental initiatives and programmes and the adoption of a strategic document for diaspora policy in 2016 (*Magyar Diaszpórapolitika* 2016). Politicians and government officials regularly visit diaspora communities and the

financial support provided for the diaspora has undergone annual growth;[2] the diaspora's incorporation into the 'unified Hungarian nation' has become one of the cornerstones of governmental political communication.

The 2016 diaspora strategy document mentions a differentiated typology of Hungarians abroad. This typology is essential for our research as it mentions recent emigrants among strategically relevant groups of the Hungarian diaspora:

> *Recent emigrants are to be strategically targeted by diaspora policy. Recent emigrants need to be integrated into Hungarian diaspora institutions and addressed by programmes provided by the home state (such as online learning materials for young people and children). The main objective of this strategy is to make the option of return migration more appealing to recent emigrants* (*Magyar Diaszpórapolitika* 2016: 25).

The document nevertheless acknowledges that the potential Hungarian diaspora is diverse: it includes individuals either belonging or not belonging to diaspora institutions, further generation descendants of Hungarian migrants and the economic, academic and political diasporic elite as well. However, the 2016 diaspora policy strategy document does not go further than defining the goal of promoting return migration among recent Hungarian emigrants, which suggests that luring home recent emigrants is a much more complex process and requires more enhanced, varied policy methods and tools.

The incorporation of recent emigrants into the diaspora strategy essentially acknowledges their role as (potential) members of diaspora. The extent of diasporisation processes among recent emigrants, however, poses a central challenge for policy-makers. International examples show that engaging new migrant communities can be a somewhat challenging task for homelands (Fiń, Legut, Nowak, Nowosielski and Schöll-Mazurek 2013). The second part of the research paper aims to address this aspect through empirical data analysis.

In Gamlen's (2006) typology, Hungarian diaspora policy may be considered as an example of the capacity-building and extending-rights models. In addition to the Hungarian Diaspora Council, the Hungarian government introduced several diaspora engagement projects that aim to help these communities to preserve their language, culture and identity. For example, the Kőrösi Csoma Sándor Programme, the flagship project of Hungarian diaspora policy, offers an internship for young Hungarian professionals to assist diaspora communities to revitalise their cultural and community life through language teaching, folkdance teaching or the organisation of cultural events. Another diaspora policy project, the Mikes Kelemen Programme, offered to help to preserve the diaspora's book collections.[3] In addition, the government also supports diaspora birthright journeys and Hungarian Sunday Schools to help the next generation of diaspora members to keep their language, culture and identity alive. These identity-focused programmes, alongside the symbolic gestures and national rhetoric, may be best categorised as capacity-building practices.

The extension of citizenship and voting rights to the diaspora belong to the extending rights category. Hungarians abroad who received citizenship via the preferential naturalisation process after 2010 were able to vote for the first time during the 2014 elections. The political campaign for the new Hungarian voters in neighbouring countries was strong but the governmental campaign was not equally intense in the diaspora (Herner-Kovács, Illyés and Rákóczi 2014). The campaign also showed similar trends in 2018. That year, the number of Hungarians living abroad who registered to vote in the national elections was relatively low – except for the Hungarian minority communities living in neighbouring countries. While only 1,495 Hungarians in the USA, 892 in the UK and 3,827 in Germany decided to vote, in Romania altogether 173,773 Hungarian citizens registered to vote.[4] A striking – and often criticised – feature of the election system has been the discriminatory approach to the voting rights of new emigrants and Hungarian minority communities in the neighbouring countries. While emigrant Hungarians (who have not given up their residency in Hungary) are only allowed

to vote in person at consulates in their respective host countries, members of the Hungarian minority communities in the neighbouring countries (who do not have residency in Hungary) can also cast their vote by post. Thus, the accessibility of voting rights of the 2 extraterritorial Hungarian groups differs significantly and suggests that the new emigrant community, unlike Hungarian minorities in neighbouring countries, does not constitute a potential source for extracting obligations for the Hungarian government (Kovács 2020).

Emigration statistics

Emigration has become a focus of academic interest and the centre of social, political debates in the last decade in Hungary. This is due to the fact that, unlike in the case of other countries in the CEE region, the volume of emigration was not substantive until the end of the 2000s – i.e., the post-communist migration tendencies started with a significant delay (Hárs 2016). The situation abruptly changed at the beginning of the 2010s; since then, ever-growing – yet still fragmented – data are available about Hungarian emigratory trends, including their volume, dynamics and demographics.

Due to the methodological and definitional differences of sources on migration, the available data indicate significant variance. According to the 2016 Hungarian Microcensus, there have been some 265,000 'people with Hungarian (ex-)spouses who reside temporarily or permanently abroad with past or current permanent residency in Hungary' (Központi Statisztikai Hivatal 2018). Due to the technical specifics of the dataset (i.e., the respondents of the questionnaire were family/household members of the emigrants), the set excludes those who emigrated long ago and those who left with their whole family. Another statistic with the same technical limitations was the national census in 2022, which again found 360,000 emigrants (Központi Statisztikai Hivatal 2022). The UN Population Division prepares annual estimates about emigrants based on the host countries' relevant statistical data. According to these estimates, approximately 632,000 persons born in Hungary were living abroad in 2019. This number was 514,000 in 2010 and 555,000 in 2015, which also indicates growth, although to a more limited extent than the population census and micro census suggest (United Nations 2019).

There are multiple explanations for the increase in emigration: the appeal of labour market opportunities in Western Europe following Hungary's EU accession, the disadvantageous labour market situation after the 2008 economic crisis and the parallel weakening social and welfare system in Hungary have all been significant factors. The wage gap between Western European and Hungarian labour markets, the growing opportunities for social mobility and the increasing migrant networks have motivated more and more Hungarians to consider emigration as an attractive – even if only temporary – alternative (Hárs 2016).

Various databases confirm that most Hungarian expatriates reside in 4 countries: Germany, the United Kingdom, Austria and the United States. In terms of the number of Hungarian emigrants, the relative ranking of these 4 countries has slightly changed over recent decades, though they still have a solid dominance. Germany, the UK and Austria are the 3 dominant target countries (Központi Statisztikai Hivatal 2014).[5] The main social and demographic features of Hungarians living abroad may be illustrated based on 2016 micro-census data. According to the datasets, the ratio of male, young and highly qualified Hungarians among emigrants is higher than among those who stayed at home (Központi Statisztikai Hivatal 2018: 12). Most Hungarian expatriates (86 per cent) reside abroad for employment reasons in 3 main industries: commercial/services, industrial/construction and low-skilled jobs. Most expatriates have prior work experience, though most frequently in different types of job than after their emigration.

Empirical research

The main question of the research is as follows:

> To what extent are recent Hungarian migrants undergoing diasporisation processes, what are their main socio-demographic and other social variables and to what extent could new emigrants resonate with the homeland's engagement?

As indicated in the theoretical section of the paper, in our understanding, the core features of a diaspora are the physical dispersion from the homeland, the cultivation of some kind of connection to the homeland and the maintenance of various (physical, emotional, symbolic, imaginative) boundaries with other groups in order to reinforce and preserve their members' identity. To explore the extent of diasporisation among recent Hungarian emigrants, we interpret a diaspora not as a static state but, rather, as a series of interactions and processes. Members of the diaspora become devoted to their community through participation in activities and events. This performative act may take place at the level of the individual. However, a diaspora is unimaginable without institutional elements as it essentially represents a link between emigrants and the home state, language and culture, which are shared with other members of the community. Thus, the migrant individual's participation in co-ethnic institutional and community initiatives in the host state are indicative factors of diasporisation processes.

Methodology

The online survey was conducted from 1 June to 30 September 2019 with Hungarian emigrants. The survey invited Hungarians who had moved abroad to answer the questions, so all Hungarian emigrants, including Hungarians from the kin-minority territories, were welcome to fill it out. The questionnaire was sent to several Hungarian news sites and was also distributed through the online channels of the Institute for Minority Studies (website, Facebook page). We made a conscious effort to minimise the network (or bubble) bias arising from the dissemination through online news sites: we sent the survey to government-critical and pro-government news sites alike and asked them to share the survey with their readers.[6]

The main questions of the research focused on the motivation for and circumstances of the respondents' emigration, their changing labour-market position, their relations with the home country, their personal relationships and their cultural ties – and on general socio-demographic indicators. The extent to which Hungarian expatriates are likely to participate in activities that may be supported by the home state's diaspora policy was also part of the survey.

Due to the lack of sufficient and precise available data on the emigrant population, online surveys are not representative of the whole observed population. Data derived from the survey indicate a larger ratio of women, a higher average age and a higher ratio of highly qualified emigrants than the previously mentioned micro-census data. Nonetheless, the main objective of the questionnaire was not to provide representative data but to explore and describe social processes and patterns among statistically relevant groups.

The survey was completed by more than 18,000 respondents, most of whom resided in Germany (3,809), the United States (938), Austria (2,071) and the United Kingdom (4,343). Thus, we limited our data analysis to these 4 countries and the results presented below describe this filtered sample. The average age of the respondents was 38; it was highest in the United States (42 years) and lowest in the United Kingdom (36 years). Respondents had been residing for an average of 6–7 years in the host countries, with the longest migration experiences in the USA (approximately 10 years). In terms of gender distribution, 48 per cent of the

respondents were women: there is a more or less balanced gender distribution in the United States and the United Kingdom, while the ratio of male respondents was slightly higher in Germany and Austria (54 per cent). The online survey indicates higher qualifications than the data derived from traditional surveys: in the 4 observed countries, approximately 60 per cent of respondents had a higher education qualification.

Results

The respondents' participation in diaspora activities and events is illustrated in Table 1, based on the data derived from the 4 observed countries. Most expatriates visited gastro events and festivals, while scouting was the least-popular activity among emigrants. The high popularity of gastro events suggests the gastronomisation of diaspora identity, which is a classic pattern of the evolution of diaspora identification. The preservation of ethnic/national identity is often constituted and reinforced by a particular cuisine (Billig 1995; Malesevic 2006). Not surprisingly, participation in scouting activities was low; as a core institution in the 'old' diaspora,[7] scouting engages members of the more recent diasporic communities, only to a lesser extent. The Hungarian Scout Movement was one of the most significant diaspora organisations of the political emigrants of WW2 and of the 1956 revolution (Bodnár 1989).

Table 1. Participation rate at diaspora institutions' events (average, Likert scale: 1 = never, 5 = very frequently)

	Germany	USA	Austria	UK	Total
1. Gastro events	2.09	2.21	2.13	1.90	2.03
2. Festival	2.09	2.17	2.16	1.88	2.03
3. Cultural events (commemoration, literature)	1.68	1.89	1.67	1.63	1.68
4. Professional events	1.67	1.61	1.76	1.58	1.65
5. Sports events	1.64	1.58	1.73	1.53	1.61
6. Movie screenings	1.53	1.59	1.55	1.46	1.51
7. Hungarian supplementary schools	1.36	1.54	1.36	1.29	1.35
8. Folk dance events	1.30	1.38	1.34	1.25	1.29
9. Political affairs events, forum	1.29	1.27	1.23	1.25	1.26
10. Scouting	1.11	1.28	1.14	1.10	1.13
11. Other	1.92	1.87	1.95	1.80	1.88

Note: Grey cells refer to above-average rate.

Data regarding the participation at various activities and events were examined in the 4 countries and significant variations were found. The highest average participation in diaspora organisations and events was found among respondents from the United States. This suggests, on the one hand, that Hungarian migrants in the US were more active and were preserving a particular 'diasporic tradition' for historic reasons, which might attract and involve recent emigrants as well. On the other hand, most Hungarians emigrated to the United States much longer ago and have longer migration experiences than migrants in other host countries.

Figure 1. The rate of emigrants not participating in diaspora activities (ratio of 'never' answers per 11 diaspora activity items)
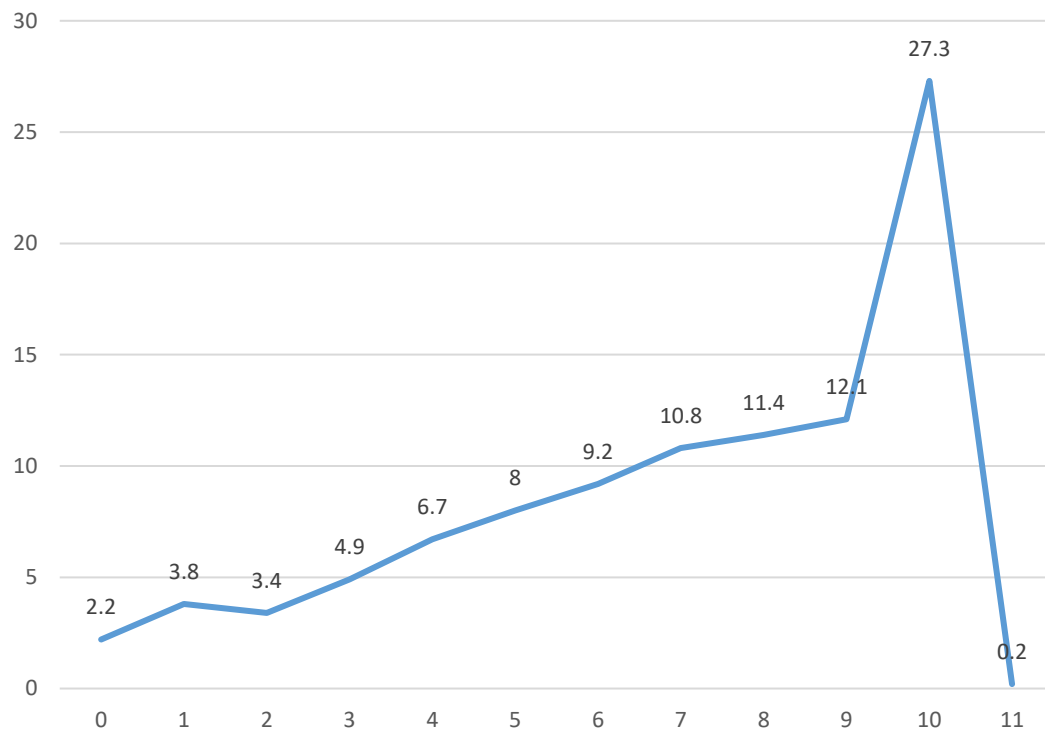
Diasporic integration and engagement can be analysed in multiple ways based on the questions regarding the frequency of participation in diaspora events. Firstly, the frequency of choosing the option 'never' at a specific event item may be indicative of diasporic integration. Figure 1 suggests that 2.2 per cent of respondents were active members of diaspora communities and had participated at all 11 activities to some extent (they did not indicate the option 'never' for any activity) and around 10 per cent chose 'never' a maximum of twice, meaning that they had participated at least in 9 activities, to some extent, out of 11. The other extreme of the scale shows respondents who would never have or only rarely (once or twice) engaged in the listed activities (that is, they chose the option 'never' for most activities): about 40 per cent went to, at most, 2 activities, which suggests low institutionalised diasporic engagement. Overall, at best 10–20 per cent of the respondents actively engaged in some institutionalised forms of the Hungarian diaspora community in their respective host countries, while about 40 per cent were not at all or were to a lesser extent interested in the activities of the diaspora community. The remaining respondents, around 40 per cent, had to some extent participated in certain diaspora events, though their motivation and the nature of their engaging in events remains unknown. As indicated formerly, concerning cross-country trends, expatriates in the United States were most actively participating in diaspora activities.

Migrant groups and main features

The research explored the nature and correlation patterns of the diaspora activities. By applying a multivariate dimension reduction method on the 11 items, we were able to outline 3 main attitude groups: a more general cultural attitude, an explicitly value-based institutionalised diasporic attitude and a group of attitudes with more explicit political motivation.[8] These attitude groupings illustrate the potential motivational differences in

the patterns of participation in diaspora events. However, the statistical relevance of the attitude results is ambiguous in terms of theoretical modeling. For this reason, 3 plausible groups have been defined by cluster analysis (Table 2). Based on the frequency of participation in Hungarian events, emigrants may be categorised into 3 groups. Firstly, members of the committed diaspora or groups currently undergoing diasporisation processes were interested in cultural events in addition to their visits to different forms of diasporic institutionalised activities, such as scouting, Hungarian Sunday Schools or folk-dancing. The group's diasporic features are embodied in their affinity towards events that are potentially part of current Hungarian diaspora policy.

Table 2. Hungarian migration groups by degree and motivation to visit diaspora events (cluster analysis, cluster centres noted)

	Engaged, diasporic ('diaspora') diaspora groups	Neutral groups, hardly engaged ('unengageables')	Migrants interested in political affairs
Cultural motivation	0.58813	-0.19328	0.87403
Diasporic values	2.47212	-0.2159	-0.51437
Political motivation	-0.12882	-0.24775	1.84534
N	965	8,250	1,175
%	9.3	79.4	11.3

Secondly, the group of politically interested or politicised emigrants were primarily interested in Hungarian political events, partially complemented by cultural affection. Peculiarly, although the 2 smaller groups – committed diaspora and politically interested emigrants – both have some cultural affection, for the diaspora group members, this interest took the shape of participation in co-ethnic community events, while politically interested migrants did not participate in such initiatives. Thirdly, members of the 'unengageable' migrant group[9] did not express interest in any kind of Hungarian diasporic events, neither in terms of culture nor of politics. Out of the 3 groups, the largest was the unengageable group, accounting for about 80 per cent of the respondents, while the diaspora group (9.3 per cent) and the politically-culturally interested emigrants (11.3 per cent) were roughly equal in size.[10]

The 2 smaller groups' social embeddedness was also different: while there were more respondents with lower qualifications in the diasporic group than the average (14 per cent of emigrants with a vocational school degree compared to an average of 9 per cent), higher-qualified emigrants were over-represented in the politicised group (67 per cent compared to the 60 per cent average). The group members' average age similarly deviated. Members of the diasporic group were older: the average age in the diasporic group was 40, while it was 38 and 37 in the politicised and the indifferent groups. In addition, members of the diasporic group had left Hungary a somewhat longer time ago than members of the 2 other groups. Members of the diasporic group were more likely to have migrated – either with their partners/families or with the objective of family unification – than the other 2 groups' members (18 compared to 14 and 17 per cent). These details partially explain why co-ethnic institutions and events were more appealing to members of the diasporic groups: they probably sought to provide their family with opportunities to experience Hungarian culture through attending weekend schools, folk dance, scouting, etc.[11]

The motivation for emigration in the 3 groups also varied (Table 3). The relevance of economic motivation was the highest among the 'unengageables' and it is fair to assume that the lack of diasporic engagement might originate in this underlying factor. Not surprisingly, dissatisfaction with the current Hungarian political situation was a strong factor in the migration decision for members of the politically engaged migrant group,

although the professional and education prospects of emigration also played a significant part in their decision. The diasporic group – in line with previous theoretical assumptions – had the strongest considerations for their economic situation in the home country: the data suggest that those who were more active in diaspora activities and events still hoped to return to the home country after having made sufficient financial savings. Furthermore, diasporic group members were considering living in Hungary in the future in a significantly higher proportion than the average respondent and had been visiting Hungary more frequently as well (though still less often than members of the politicised group).

Table 3. Migration motivation of selected migration groups (average, Likert scale: 1 = Not at all important, 10 = very important)

Why did you emigrate from Hungary?	Engaged, diasporic ('diaspora') diaspora groups	Neutral groups, hardly engaged ('unengageables')	Migrants interested in political affairs	Total	Sign
To find a better job	7.54	7.70	7.51	7.66	0.048
To increase living standard, better subsistence	8.05	8.32	7.97	8.26	0.000
To pursue higher-quality education	5.12	4.85	5.74	4.97	0.000
To save money for own investment/enterprise in the home country	2.85	2.39	2.48	2.44	0.000
To save money for loans in the home country	3.26	2.53	2.48	2.6	0.000
To escape the hopeless Hungarian economic situation	7.45	7.65	7.41	.6	0.011
To escape the hopeless Hungarian political situation	7.00	7.39	7.78	7.4	0.000
Due to personal (family, relationship) reasons	3.74	3.63	3.59	3.64	0.616
Out of curiosity, adventure	4.53	4.92	5.16	4.91	0.000
To develop personally or professionally, self-realisation purposes	6.19	6.52	7.11	6.55	0.000

Note: Grey cells refer to above-average rates.

A section of questions was focused on emigrants' interests in the home and host country's cultural, political and economic affairs in order to explore aspects of homeland orientation and ethnic border maintenance. Our hypothesis was that members of the diasporic group were more interested in the home country's cultural, economic and public affairs, while politicised emigrants were more engaged in political affairs. In terms of symbolic border maintenance, diasporic group members had been assumed to showcase less interest towards local affairs and events. The findings of the survey confirmed the hypothesis (Table 4). Members of the diasporic group demonstrated a higher-than-average interest in Hungarian economic and cultural affairs but less so in Hungarian political affairs. Politically active emigrants revealed a peculiar feature: they were extremely interested in both home- and host-country affairs, which may originate in their higher-than-average educational background. To some extent, this group also embodied diasporic features but was clearly

distinguished from the diasporic group due to their high interest in host-country affairs. Here we have to relate to the diaspora group's ethnic border maintenance feature: it is quite clear that they were less invested in the host country's affairs and society than the politicised migrants, who were engaged in both the home- and the host-country's directions. The distinct integrational patterns reinforce the necessity to differentiate between the two groups: politically active emigrants were interested in Hungarian culture and the home state affairs (even though they did not visit diaspora events), they visited Hungary often but, at the same time, they intensively participated in the host country's local, political, economic and cultural affairs. These findings indicate the highly transnational nature of this group (Portes 2001; Tsuda 2012).

Table 4. Interests of migration groups in terms of home- and host-country economic, political and cultural affairs (average, Likert scale: 1 = not at all interested, 10 = very interested)

To what degree are you interested in…	Engaged, diasporic ('diaspora') diaspora groups	Neutral groups, hardly engaged ('unengageables')	Migrants interested in political affairs	Total
Hungarian political affairs, news?	6.19	6.05	7.44	6.22
Hungarian economic affairs?	6.27	5.96	7.13	6.12
Hungarian cultural, public affairs, events?	6.33	5.69	7.00	5.89
Political affairs in your current country of residence?	6.70	6.75	7.76	6.86
Economic affairs in your current country of residence?	7.06	7.06	7.81	7.14
Cultural and public affairs in your current country of residence?	6.89	6.78	7.74	6.90

Note: Grey cells refer to above-average rates.

Border maintenance elements in interpersonal relations were observed through several questions, primarily in terms of the emigrants' social connections and relations. Our hypothesis assumed that the diasporic group engaged with their fellow Hungarians to a greater extent than the politicised emigrant group, while the latter, as a transnational group, was presumed to connect more with other transnational migrants and locals. These hypotheses were entirely confirmed (see Table 5). The 3 groups showcased completely different behaviour patterns: diasporic group members met up with other Hungarians to a more substantial degree than with locals or other migrants, while transnational group members were more open to locals and other migrants than to co-ethnics.

Table 5. Migration groups' informal relations (average, Likert scale: 1= not at all friendly, 10 = very friendly)

To what extent do you have friendly relationship with…	Engaged, diasporic ('diaspora') diaspora groups	Neutral groups, hardly engaged ('unengageables')	Migrants interested in political affairs	Total
Other Hungarians in your current country of residence?	6.55	4.77	5.80	5.05
Other (non-Hungarian) migrants in your current country of residence?	6.39	6.10	6.79	6.21
Non-migrant citizens in your current country of residence?	7.02	6.83	7.39	6.91

A similar trend can be observed concerning who migrants relied on the most when they needed help (Table 6). Members of the diasporic group relied on Hungarian co-ethnics in their host country to a greater extent than members of the other 2 groups and they tended to count on Hungarian civil society organisations (CSOs) more compared to members of the other 2 groups. On the other hand, members of the transnational group trusted host-country actors and offices as well as home-country friends and acquaintances. These findings reinforce homeland orientation among members of the diasporic groups and also reinforce the transnational feature of the politicised migrant group.

Table 6. Relations in migration groups when in need (average, Likert scale: 1 = would not rely on them, 10 = would completely rely on them)

If you had difficulties, to what extent would you rely on…	Engaged. diasporic ('diaspora') diaspora groups	Neutral groups. hardly engaged ('unengageables')	Migrants interested in political affairs	Total	Sign
Your family, living in Hungary?	7.50	7.56	7.67	7.57	0.451
Your friends living in Hungary?	6.21	6.17	6.58	6.22	0.000
Your Hungarian friends who live in your current country of residence?	6.96	6.30	6.81	6.42	0.000
Your other migrant friends who live in your current country of residence?	6.29	6.02	6.57	6.11	0.000
Local (non-migrant) citizens, friends in your current country of residence?	6.77	6.66	7.11	6.72	0.000
Local district offices, authorities?	7.61	7.64	7.88	7.66	0.003
Local civil-society organisations?	7.10	7.05	7.42	7.1	0.000
Hungarian district offices, authorities?	3.37	3.11	3.28	3.15	0.001
Hungarian civil-society organisations?	3.38	3.33	3.93	3.41	0.000

Diasporisation processes and transnationalism

Among the identified groups, members of the diasporic group confirmed the main features of diaspora following Brubaker's (2005) theory: spatial dispersion, homeland orientation and boundary maintenance. Spatial dispersion was a given feature since the survey targeted migrant individuals. Homeland orientation was identified at several levels: members of these groups participated in diasporic events (which were relevant for Hungarian diaspora policy) and they maintained a more explicit interest in return migration to the home country. The dominant economic motivation of their migration also revealed a homeland orientation. Conceptually, should the return migration aspirations materialise, the diasporic group could not be considered as a diaspora, because it did not undergo the specific diaspora institutionalisation process. Instead, the group only featured certain diasporic elements: their social life took place at events that were targeted by the home government as part of its diaspora policy. Eventually, the underlined process corresponded to the main objectives of the Hungarian diaspora policy laid down in the strategic documents: to 'encourage' recent

emigrants to return home. Diasporic elements were identified concerning border maintenance as well: at an informal level, members of this group sought more connections with their fellow expatriates and would ask for help to a greater extent from Hungarian offices when in need than members of the other 2 identified groups (see Table 6).

Politically interested migrants were found to have higher qualifications than members of the other groups and they actively engaged in both host- and home-country affairs. In their case, home-country relations did not involve border creation towards the host-country society. Group members tended to be integrated in the host country, thus they could be considered as a transnational group. Strong political interest, enhanced informal relations with the home country and frequent visits to Hungary were also characteristics of them.

It is noteworthy that academics – both in diaspora and transnational studies – risk forfeiting or depreciating the substantive meaning of transnationalism by using it all too frequently and generally to describe migration processes (Brubaker 2005; Durst 2019; Portes 2001). At the same time, this group is best characterised as transnational following Portes *et al.*'s (1999) definition of 2 prerequisites for transnational groups: 1) generally prevailing connections with the home and host country on a wider scale among the members of the group; and 2) the regularity of solid transnational social, economic, cultural and political activities. The research findings convincingly suggest the existence of this group, as well as their active presence in both home and host societies simultaneously. Members of the group were highly qualified, which positively affected their opportunities to benefit from resources in the transnational sphere.

Discussion

The paper aimed to discover whether recently emigrated Hungarians showed signs of diasporisation that could lead to the establishment of new diaspora communities. Based on an online survey carried out among recent Hungarian emigrants, we identified 3 main groups: a group undergoing a process of diasporisation, a transnational emigrant group with strong political interest and a group that were also indifferent to diaspora initiatives and transnational engagements. The first group of emigrants (approximately 10 per cent) had engaged, to some extent, in cultural heritage and identity preservation institutions, initiatives or activities. Even though this group seemed to be undergoing certain diasporisation processes, we were aware that the future of this process – i.e., the participation in diaspora institutions and activities – is inherently ambiguous. The current Hungarian government's diaspora policy is supportive of diaspora institutions, both discursively and financially, which could contribute to the preservation of ties between the home country and emigrant communities; thus the identified diasporic group was a potential beneficiary of the homeland's diaspora policy.

Our research identified a transnational group as the second distinctive cohort of emigrants. This group consisted of younger and more-qualified emigrants who maintained strong relations with both home- and host-country actors. They had a strong interest in culture, politics and public affairs but were distinct from the first group due to their disinterest in traditional diaspora activities (such as scouting or Hungarian weekend schools). For the members of this group, all the prerequisites and resources were given for successful transnational positioning.

The third and largest group in the survey was labeled as the 'unengageables', as they were not engaged in diaspora initiatives and did not show any interest in transnational activities. As a result, they did not resonate with any elements of the homeland's diaspora policy. Though the short online survey method does not enable a more thorough, deeper analysis uncovering daily interactions, the statistical analysis indicates the presence of these 3 distinctive groups, which allows for a comprehensive analysis of diaspora policy consequences.

To put home country and diaspora communities' relations under more scrutiny, research findings suggest that Hungarian diaspora policies engage and, to some extent, produce and consolidate groups undergoing the process of diasporisation: while home-country initiatives mostly address already established institutions,

seeking support from the home state may play a significant role in the emergence of new diaspora institutions. In Gamlen's (2006) capacity-building model, the engagement of new diaspora groups through various supporting programmes not only bears a symbolic meaning; it may even shed light on and facilitate the governmentality of these groups by the home state. The extending rights model does not predominate in the new diaspora, as members – recent emigrants who are overwhelmingly Hungarian citizens – already possess rights in the Hungarian social and political system. The analytical frame offered by the extending rights model may become increasingly relevant with time, in terms of second- and third-generation emigrants. A key element of future diaspora policy will be based on the need to socially, culturally and even politically engage and integrate recent emigrants' descendants into a home state where they have not socialised.

However, it remains an open question whether Hungarian diaspora policy attempts to address the described emigrant communities. In the case where the home country successfully engages with these groups, the transnationalisation of capacity-building could result in migrant individuals and groups who are integrated into both the home- and the host-country societies. Nonetheless, should diaspora policy fail to engage with these groups, the politically active transnational communities may become a kind of counter-diaspora, acting in opposition of the home state's diaspora policy. This paper provided a detailed analysis of diaspora processes, home-state relations and integration in the context of new Hungarian emigrants. The analysis focused on exploring the new, young and emerging diaspora groups; however, the consolidation and institutionalisation of these groups is highly dependent on global and home-state factors that are yet to be seen.

Notes

1. For a good example, see the members of the emigrant Russian-Jewish community and their relations with the home state in Israel (Ben-Porat 2011).
2. In 2024, the Hungarian government provided HUF 500 million in support for Hungarian diaspora organisations; see: https://bgazrt.hu/wp-content/uploads/palyazati_kiirasok/kulhoni_tamogatasok/2024/ENP_DSZ_palyazati_kiiras_2024.pdf (accessed 7 March 2025).
3. The Mikes Programme has been closed. It ran between 2014 and 2022.
4. https://www.valasztas.hu/hu/kulhoni-magyar-allampolgarok-valasztasi-regisztracioja.
5. According to the 2016 micro census, altogether 71 per cent of emigrants were living in 1 of the 3 countries at the time of completing the questionnaire.
6. The survey was sent to index.hu, hvg.hu, 24.hu, azonnali.hu, mandiner.hu, demokrata.hu, magyarnemzet.hu and to a blog dedicated to Hungarian emigrants, hataratkelo.hu.
7. Old diaspora refers to the emigration waves of the 20th-century political turmoils.
8. In statistical terms, principal component analysis.
9. They could be labeled as a secluded, neutral or disengaged group as well. However, this analysis observes the diaspora from the home state's perspective, which is why this group is named 'unengageable', e.g. falling beyond the reach of the home state.
10. These numbers correlate with former academic results. Gyula Borbándi, one of the most significant scholars of Hungarian emigration, also came to the same conclusion – though without a questionnaire. In terms of Hungarian emigrants in Denmark, he notes that only 10–15 per cent of Hungarians participate in Hungarian social life and suggests that the tendency is the same in other countries as well (Borbándi 1996: 68).
11. On the socialisation functions of Hungarian weekend schools in the UK, see: Papp, Kovács and Kováts (2023).

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From the European Dream to the Cultural Bubble: A Qualitative Examination of Kazakhstani Students' Adjustment Experiences in Hungary

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In the extensive literature on adjustment and acculturation, cultural distance has emerged as a topic of increasing interest among researchers. While many studies have traditionally focused on the intrapersonal processes of individuals undergoing adjustment, there has been a notable gap in research examining the broader ecocultural contexts of intercultural contact. The present research aims to further fill this gap by focusing on the adjustment experiences of Kazakhstani students within a Hungarian context. We used semi-structured interviews with 20 Kazakhstani students, complemented by an ego network questionnaire, to examine social contact preferences. Through these methods, we sought to explore how individuals from a non-Western country navigate the challenges and opportunities of adjusting to a relatively Westernised environment. Our study highlighted significant perceived differences in cultural aspects, gender roles, relationship ties and family values between the two countries. Most participants essentialised their ethnic identity and preserved their ethno-cultural heritage in the private domain of their lives, such as marriage and family. Perceived cultural differences and limited contacts with their hosts might explain why most participants in our study prefer friendships with co-nationals.

Keywords: Kazakhstani students, Hungary, cross-cultural adjustment, ecocultural context, social contact, ethnic enclaves

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Introduction

Embarking on the journey of studying abroad opens up a realm of possibilities for international students. However, moving from one country to another involves substantial changes in their original ways of living (Ward, Bochner and Furnham 2001). These changes necessitate profound adjustment in their psychological, sociocultural, emotional and academic aspects (Duru and Poyrazli 2011). The success of this process depends not only on the features of the culture of settlement but also on the culture of origin (Ward and Geeraert 2016). Therefore, it is crucial to comprehend the adjustment patterns of students, which vary depending on the unique influences of both host and home cultures on the adjustment process.

Hungary is gaining in popularity among international students as a host country. The ratio of international students within the total student population in Hungary was 7.25 per cent in 2013, rising to 9.94 per cent in 2016 (Oktatási Hivatal 2016). By 2019, the share of international students had reached 13.48 per cent. Between 2013 and 2022, the ratio of international students nearly doubled (Oktatási Hivatal 2022), increasing from 7.25 per cent to 14.39 per cent due to the impact of the Hungarian policy 'Opening to the East' (Lannert and Derényi 2018). In 2013, the Hungarian government established the Stipendium Hungaricum Scholarship (SH) programme, with the aim of attracting thousands of international students each year to study tuition-free at Hungarian higher-education institutions. Following the launch of the SH programme, there was a perceptible increase in the number of international students in Hungary, especially from post-Soviet countries (Samokhotova 2018). According to the Hungarian Education Authority (Oktatási Hivatal 2020), there were 37,925 international students out of a total of 287,493 students in the country during the 2020/2021 academic year. This number rose to 41,730 out of a total of 289,991 students by the 2022/2023 academic year, reflecting a growth of approximately 10 per cent (Oktatási Hivatal 2022). The upward trend continued in 2023/2024, with 43,137 international students recorded among a total student population of 310,414, representing a further 3.4 per cent increase in the number of international students compared to the previous year (Oktatási Hivatal 2023). This figure continues to rise annually, driven by the increasing interest and popularity of this programme.

According to the latest data from the United Nations Educational, Scientific and Cultural Organization, Kazakhstan sent 89,292 students abroad in 2019, an increase of nearly 14.11 per cent compared to the 78,253 students sent in 2015 (UNESCO 2019). Nevertheless, research on the adjustment and adaptation experiences of Kazakhstani students is very limited, with many of the previous studies focusing on repatriates, migrants and short-term exchange students from Kazakhstan (Bokayev, Zharkynbekova, Nurseitova, Bokayeva, Akzhigitova and Nurgalieva 2012; Valieva, Sagimbayeva, Kurmanayeva and Tazhitova 2019). A significant number of studies have explored the political, economic and educational changes that have taken place in Kazakhstan since the fall of the Soviet Union, while research identifying and describing Kazakhstani students' adjustment and adaptation experiences in the host country has been lacking.

With growing interest in the choice of Kazakhstani students to study in Hungary, we can observe different contextual features as well as similarities between both countries which may influence the adjustment process and its outcome. First, the shared legacy of the communist regime affected the economic structure, cultural and ethnic diversity, demographic trends and educational systems of Kazakhstan and Hungary to varying degrees (Huisman, Smolentseva and Froumin 2018). According to Orosz and Perna (2016), the Eastern bloc countries were not officially integrated into the Soviet education system, as it was in the case of post-Soviet countries; however, these countries still have similar features not only in their economy, politics and culture but also in the common characteristics in higher-education systems which they share. Traditional teaching methods and educational programmes with subject-centred curricula are still preserved in many post-communist settings (Chankseliani and Silova 2018; Khavenson and Carnoy 2016; Steiner-Khamsi 2006). On the other

hand, Samokhotova (2018) highlighted differences between the academic cultures of post-Soviet countries and Hungary, the latter having adopted more Western norms. Kazakhstan and Hungary are geographically distant. Moreover, the two countries exhibit contrasting climatic and environmental conditions. Culturally, Kazakhstan is a collectivist society compared to Hungary, which is an individualistic society with an individualism index score of 80, indicating a preference for a loosely knit social framework (Hofstede, Hofstede and Minkov 2010: 95). Given the significant differences in geography, climate and cultural orientation between Kazakhstan and Hungary, it is worth noting that both countries are members of the Turkic Council. This latter, officially known as the Organisation of Turkic States, is an intergovernmental organisation that aims to promote cooperation between Turkic-speaking countries in various fields, including politics, economics and culture (Organisation of Turkic States, n.d.). Kazakhstan is one of the founding members, while Hungary joined as an observer member in 2018, meaning it participates in activities but does not have voting rights.

Consequently, considering the impacts of the shared legacy of the communist regime and possible cultural differences and/or similarities between Kazakhstan and Hungary, Kazakhstani students in the Hungarian context were chosen as target participants.

Theoretical background

The present research was guided by the theoretical frameworks proposed by Ward and Geeraert (2016), as well as Schartner and Young (2016) which delineate cross-cultural adjustment as a dynamic and evolving process. The theoretical framework by Schartner and Young (2016) encapsulates the entire process of the 'international student experience' and clearly differentiates between 'adjustment' and 'adaptation' concepts. The term 'adjustment' pertains to the process of change experienced by an individual, while 'adaptation' refers to the outcome or result of this process. Methodologically, 'adjustment' can be tracked over time using qualitative methods, while 'adaptation' can be assessed through various outcome measures (Young and Schartner 2014). Given that our study is primarily qualitative and explores participants' lived experiences, we applied the concept 'adjustment' throughout the manuscript in explaining our study's findings.

Ward *et al.* (2001) divided the process of adjustment into two broad dimensions, which are related but conceptually distinct: psychological and sociocultural. Sociocultural adjustment refers to how well an acculturating individual *does* in the host society while psychological adjustment refers to how well an acculturating individual *feels* in the host country. Previous studies have shown that it is justified to add an academic adjustment when studying international students in a host country (Yerken and Nguyen Luu 2022; Zhou, Jindal-Snape, Topping and Todman 2008). Psychological adjustment can be explained in the context of stress and coping theory, which considers coping resources as emotional and problem-focused efforts to manage stressful situations (Lazarus and Folkman 1984). Sociocultural and academic adjustment is typically viewed through the lens of culture learning and social skills, which assumes that cross-cultural difficulties occur because students struggle to learn social skills and culture-specific knowledge which would enable them to fit into a new academic and sociocultural context (Argyle 1969; Ward *et al.* 2001).

Furthermore, Schartner and Young's (2016) theoretical framework distinguishes between contributory factors that significantly impact on international student adjustment: 'pre-sojourn' and 'in-sojourn' factors. Pre-sojourn factors encompass aspects like knowledge about the host country, language proficiency, prior overseas experience and motivation for studying abroad. Earlier studies reported that 'pre-arrival' factors have a significant impact on an individual's adaptation potential (Young and Schartner 2014; Young, Sercombe, Sachdev, Naeb and Schartner 2013). On the other hand, in-sojourn factors include social contact with host nationals and/or other international students, as well as social support. Social contact was found to be a significant 'in-sojourn' factor especially for the outcomes of the adjustment process: academic, psychological and

sociocultural adaptation (Szabó, Papp and Nguyen Luu 2020; Ward and Szabó 2019; Young *et al.* 2013). Having more friends from the host society fosters sociocultural and psychological adaptation by providing opportunities for culture learning and stress reduction (Cheung and Yue 2013; Geeraert, Demoulin and Demes 2014; Wilson, Ward, Fetvadjiev and Bethel 2017). Being socially connected only with one's co-nationals was associated with reduced sociocultural adaptation as it limits one's opportunities for culture learning (Geeraert *et al.* 2014).

In accordance with the framework of Ward and Geeraert (2016), the process of 'change' takes place within various ecological systems that overlap and create a group of influencing factors on the individual. These contextual factors 'set the scene and define the operating parameters', which can increase or decrease the likelihood that an acculturating individual will adapt well (Stuart and Ward 2015: 674). Ward and Geeraert (2016) defined *familial*, *institutional* and *societal* dimensions which exert an influence on the process of adjustment within both the home and the host cultural environments. Understanding the nature and attributes of the heritage and settlement cultures, along with their compatibility, is very significant. Greater cultural distance not only complicates the integration process but also heightens acculturative stress, thereby affecting psychological and sociocultural adjustment (Benet-Martínez 2012; Ward 2001; Ward and Geeraert 2016). In this paper we primarily focus on the institutional and societal levels, which underscores the significance of cultural distance within the educational and sociocultural environments of both host and home countries.

Ward and Geeraert (2016) criticised the fact that very few studies investigated adjustment and adaptation experiences within the broader ecological contexts of intercultural contact; most studies focused only on the intrapersonal processes of the individual. They suggested that the impact of cultural distance between the heritage and the host cultures – as well as their distinct contexts – on cross-cultural adjustment, warrants critical re-examination, with the inclusion of a broader range of cultures. There is very scarce research available on the adjustment experiences of Kazakhstani students in a host country. Recent research on the academic adjustment of international students from post-Soviet countries in Hungary highlighted the importance of considering not only the contextual factors of the host country but also those of the country of origin, as international students come from diverse contextual backgrounds (Yerken and Nguyen Luu 2022). Another study on international students from post-Soviet countries in Hungary revealed that the students had fewer sociocultural difficulties in academic performance, power relations, affiliative relations and cultural understanding compared to those international students who were from other countries of origin (Yerken, *Urbán and Nguyen Luu* 2022). These results may reflect the impact of cultural distance and historical political parallels between host and home countries on students' adaptation. A previous study (Samokhotova 2018) conducted on Russian-speaking international students in Hungary identified that, in comparison to students from other post-Soviet states, Kazakhstani students reported a relatively significant cultural distance between Kazakhstan and Hungary.

The present research endeavours to further fill this gap by focusing on the adjustment experiences of an under-researched group – precisely Kazakhstani students in a Hungarian context. We believe that it is important to investigate the adjustment of students from non-Western countries studying in a relatively Westernised context. A previous study demonstrated that students from post-Soviet countries perceived an imaginary axis of 'post-Soviet' versus 'West' dimension, where Hungary was seen as 'in between', though closer to the 'Western world' compared to post-Soviet countries (Yerken and Nguyen Luu 2022: 191). Considering certain similarities in politics and education in the past between Kazakhstan and Hungary, as mentioned above, we aim to study the impacts of possible cultural differences and/or similarities on the adjustment process of our participants within a broader ecocultural context. Thus, we can develop a more comprehensive understanding of the multifaceted challenges and strategies associated with international students' journeys in a new academic and sociocultural environment. Furthermore, students from Kazakhstan

came from a relatively highly collectivistic society compared to Hungary, meaning the greater importance of community and interpersonal relationships (Hofstede *et al*. 2010). Social contact with co-nationals was found to be one of the essential factors in cross-cultural adjustment (Szabó *et al*. 2020). Therefore, it is important to explore Kazakhstani students' social-contact preferences in a new academic and sociocultural context and their role in students' adaptation.

We began our investigation with three research questions: (1) How do Kazakhstani students experience the process of adjustment to new sociocultural and academic contexts in Hungary? (2) How do international students perceive and experience cultural distance in their transition to Hungary? (3) What are the social-contact preferences of Kazakhstani students in Hungary and what are the reasons behind them and their consequences regarding the adjustment of these students?

Methods

We conducted semi-structured interviews with Kazakhstani students to investigate their adjustment experiences in Hungary. Reflexive thematic analysis was used to analyse the data (Braun and Clarke 2020). We also used an ego network questionnaire (Fischer 1982) to examine the social-contact preferences of Kazakhstani students in Hungary. Approval for the research was obtained from the Research Ethics Committee at the university to which the authors are affiliated.

Participants

Purposive sampling was used to recruit participants for the study via social media. We used snowball sampling to reach the target population. Inclusion criteria were being an international student from Kazakhstan and having resided in Hungary for at least 6 months.

Twenty Kazakhstani students (11 males and 9 females) took part in the semi-structured interviews in Hungary. Participants were between 19 and 29 years of age and the length of residence in Hungary was between 9 months and almost 3 years for educational purposes. Most of the students reported being single (*n* = 17)*,* while three reported being in a relationship. Participants included international students doing Bachelor's, Master's and Doctoral degrees in Hungary. Characteristics of the sample are presented in Table 1.

Procedure

Data were collected between June and December 2019, just before the Covid-19 pandemic started. Participants were interviewed in person in Kazakh, Russian or English, depending on their language preferences. Interviews conducted in Kazakh or Russian were translated into English for further analysis. In order to avoid power distance and linguistic domination in the researcher–researched relationships (Andrews, Holmes, Fay and Dawson 2019; Holmes, Fay, Andrews and Attia 2013), acknowledging multiple languages at play and empowering participants' voices were important. Utilising the multiple languages enabled us to engage deeply with our interviewees, resulting in richer data generation. This approach facilitated a more comprehensive expression of the participants' experiences, allowing them to convey their thoughts and emotions in their full richness. Additionally, it fostered a relational space characterised by collaboration, trust and mutual respect between the researchers and the participants.

Table 1. Characteristics of the Sample Including Gender, Age, Length of Residency, Marital Status, University Degree Level, and Major (*N* = 20)

No.	Pseudonyms	Gender	Age	Length of residency	Marital status	University degree level	Major
1	Askar	Male	27	9,5 months	Single	MSc	Mechanical Engineering
2	Zhanar	Female	24	2 years	Single	MSc	Applied Linguistics
3	Fariza	Female	20	10 months	Single	BSc	Psychology
4	Aizere	Female	21	1 year	Single	BSc	Psychology
5	Mariyam	Female	21	1 year and a month	Single	Bsc	English and American studies
6	Aizhan	Female	27	1 year and 9 months	Single	PhD	Education
7	Perizat	Female	26	2 years and a month	Single	PhD	Computer Linguistics
8	Hadiya	Female	29	2 years and 3 months	Single	PhD	Education
9	Sardar	Male	19	9 months	Single	BSc	English and American studies
10	Aisha	Female	27	1 year and 9 months	Single	MSc	Central European Studies
11	Yernar	Male	23	1 year and 8 months	Single	MSc	Mechanical Engineering
12	Dariya	Female	22	1 year and 3 months	In a relationship	MSc	Environmental Engineering
13	Ali	Male	24	1 year and 9 months	Single	MSc	Computer Science
14	Amirkhan	Male	25	1 year	In a relationship	MSc	Chemistry
15	Murager	Male	19	1 year and 9 months	Single	BSc	Technical Management
16	Akan	Male	23	10 months	In a relationship	MSc	Engineering Management
17	Bek	Male	19	1 year and a month	Single	BSc	Psychology
18	Mukhtar	Male	20	2 years and 9 months	Single	BSc	Management in Business and Diplomacy
19	Alan	Male	21	2 years and 9 months	Single	BSc	International Relations
20	Sultan	Male	19	2 years and 9 months	Single	BSc	International Relations

The researching-multilingually approach, as highlighted by Holmes *et al.* 2013; Holmes, Fay, Andrews and Attia 2016, presented both opportunities and challenges for us, particularly since neither the researchers nor the participants had English as their first language. One significant challenge was the doubling of the workload due to the presence of multilingual datasets, necessitating translation into English for analysis. Moreover, software limitations in handling multilingual data added further difficulties to the process. To address these challenges, the translation approach involved ongoing dialogues between the researchers and continuous review of the translated transcripts. This ensured accuracy and fidelity to the original meanings conveyed by the participants. Importantly, consulting with the participants during the translation process helped to maintain trustworthiness in representing their experiences accurately. Additionally, during the member checking process, the researchers collaborated closely with each other to enhance the credibility of the findings.

Participants gave their informed consent and completed a demographic questionnaire. Each interview lasted between 60 and 90 minutes and was recorded digitally. The interview questions covered topics such as cultural distance, social support, various aspects of identity, previous intercultural experience, acculturative stressors and daily difficulties, adjustment, acculturation orientation, stress and coping and an appraisal of the student's stay in Hungary.

After the semi-structured interviews, participants were asked to complete an ego network questionnaire. Ego network analysis was applied to determine the prevalence of social contacts among international students in Hungary. Moreover, it allowed us to understand general patterns in our participants' social networks and their relation to the students' adjustment experiences in Hungary. We used the 'name generators' tool, in which international students were asked to identify and give a pseudo-name to a specific person in three different situations. The 'name generators' tool is the most effective method of identifying an individual's social networks and it was based on the method developed by Fischer (1982). We identified networks of social contacts in three different situations: sharing the most important issues in the last 6 months; organising programmes and free time; and getting help with solving smaller or bigger difficulties in everyday life.

Data analysis

The data were analysed using the guidelines for conducting reflexive thematic analysis (Braun and Clarke 2020). Atlas.ti 9 Mac software was used for the coding procedure. The transcription and analysis of the data were performed by the first author, in discussion with the second author.

Lincoln and Guba (1985) stated that one of the ways in which researchers can convince a reader about the worth of a study is trustworthiness. They proposed that the criteria of credibility, transferability, dependability and confirmability define the concept of trustworthiness. In the present study, to fulfil Lincoln and Guba's (1985) criteria for trustworthiness, we followed a step-by-step approach during each phase of thematic analysis, which was offered by Nowell, Norris, White and Moules (2017). We followed a six-phased method in thematic analysis, which was originally proposed by Braun and Clarke (2006). These six-phased steps are the following: being familiarised with the data; generating initial codes; searching for themes; reviewing initial themes; defining and naming themes; and producing the report.

Firstly, we checked and read each transcript to familiarise ourselves with the depth and breadth of the content and identify items of potential interest. Initial codes were generated focusing on semantic meaning. We inductively analysed the data, concentrating on a broad thematic pattern throughout the coding process. Once all the data were coded, initial themes were generated from the collated data. We incorporated themes that were particularly rich and multifaceted, ensuring that they could encapsulate the central ideas of the data and convey the narrative effectively. These themes allow us to address our research questions comprehensively. Potential themes were reviewed and refined again during the review phase. All the extracted

codes were read and the patterns were reviewed for cohesive meaning. The analysis was continued by defining and revising the themes to determine which aspects of the data each theme represented. The last phase involved reporting on the four themes (Braun and Clarke 2006, 2020).

Results

Four themes were generated from the interview data: (1) In search of the best opportunities abroad; (2) Finding common ground between dreams and reality; (3) Contrasting values; and (4) Life inside a bubble.

In search of the best opportunities abroad

The first theme encompassed several motives that had influenced Kazakhstani students' decisions to apply for study in Hungary. These 'pre-sojourn' factors are categorised based on the extent to which the desire to study abroad was driven by external or internal influences. The 'pull factors' that attracted international students to Hungary included future and employment opportunities, a European diploma, personal development, prior intercultural experience and a compared quality of education. For instance, Hadiya emphasised that the recognition and prestige of earning a degree from a European institution was a significant motivating factor, as it not only enhanced her CV and employment opportunities but also expanded her connections and experience and fostered personal development.

Some of the students mentioned opportunities to build intercultural competence through travelling, practicing several languages and meeting people from different backgrounds. Studying abroad was described as helping the students to 'step out' from Kazakhstan into the international sphere, where diverse experiences and unforeseen learning opportunities await them, as Aizere suggested: 'International experience is valuable. I was sure that Hungary would give me something that I could not get in Kazakhstan. I wanted to meet people from different backgrounds'.

Several participants already had experience of travelling, staying or studying abroad for short periods. Participants with previous intercultural experience regularly compared the quality of life and social situations between Kazakhstan and the 'Western world', using it as a point of reference. This exposure may have sparked their desire for an international education and could facilitate a smoother adjustment process. Students who previously studied in a Westernised context had already undergone the adjustment process once, making their second immersion in a foreign setting potentially easier and faster, as Alan, a Kazakhstani student, reported: 'I have seen people abroad, I have lived abroad before and I liked it. That's why, while I was graduating from high school, I was sure that I am gonna be abroad'.

Some of the interviews touched on beliefs about life abroad, which was expected to be better and more attractive than life in Kazakhstan. There was a general acknowledgment of the many contrasts between post-Soviet countries and Europe, whereas students believed that Hungary would represent a midpoint between these two opposites on this 'imaginary dimension'. Responses appeared to echo the idea that life and education in Europe are of better quality and more modern compared to Kazakhstan, which was recognised as being a post-Soviet country characterised by fewer opportunities and the remnants of a Soviet education system. Hungary – due to its being influenced by the West – is seen as offering valuable things from which to learn.

Even though we have some similarities in mentality, we, Kazakhs, are not as open-minded as Hungarians. Being a part of the European Union influenced Hungary a lot and these influences are good. Kazakhstani people need to learn a lot from the Western world. I am not proclaiming that the West is doing good and the East is crap, no. But I think we should change our view of life (Alan).

Leaving Kazakhstan to study abroad is seen as a great and highly sought-after opportunity that cannot be missed, not only by our interviewees but also by their surroundings in the home country:

I was surrounded by people who never wanted to stay in Kazakhstan because they wanted to use this opportunity. People leaving the country to study abroad with good scholarships were always a great example in my eyes (Sardar).

Alongside these 'pull' factors, participants reported several factors that 'pushed' them to study in Hungary. One student, Alan, mentioned the socioeconomic and political situation in Kazakhstan as the main reason: 'I was not satisfied with the situation in my country. That was the main motivation'. Students reported the quality of education in Kazakhstan as another push factor that prompted them to apply to Hungary. Although, after the fall of the Soviet Union, the government of Kazakhstan tried to introduce changes to the education system in response to modern needs and the process of internationalisation, education in Kazakhstan today still faces insufficient quality. Its reasons include the low number of qualified teachers, outdated curricula and a lack of educational resources. Introduced changes can also be perceived as a problem, as Aizere states: 'The Kazakhstani education system changes constantly, which is the biggest negative side. The current system lacks lots of professionals that can deliver a new system'.

Several statements referred to the remnants of Soviet education in Kazakhstan, where teachers play a leading role in the students' learning process. As a society characterised by a high-power distance, the authority of teachers is given great emphasis in Kazakhstan: 'In Kazakhstan, teachers are tough. Maybe it is because of the Soviet education system. But young teachers try to integrate into the European system and behaviour' said Yernar. This quote refers to a hopeful sign of change: there are educators in Kazakhstan who have adopted a modern, 'European' teaching style and the international students use this as a point of reference. This is something they seem to look for during their studies abroad.

Finding common ground between dreams and reality

Prior to their arrival in Hungary, the imagined picture of Hungary varied between the different students. It means a frame of reference, influencing the students' appraisal of their situation in the host country. For many of our interviewees, Hungary would mean Europe. These students had high preliminary expectations of Europe, although many of them were subsequently disappointed. Their first, visual experiences did not live up to what they had imagined and expected. One student, Alan, whose previous experience abroad was limited to travelling, shared: 'I was expecting a bit higher level of standards. (…) I remember the road from the airport to the city centre by bus. It was a mess around. I didn't feel the Europe that I used to see before'.

Several other participants reported that their worst expectations about Hungary being greatly impacted by the Soviet Union were not proven to be true. The Eastern bloc countries were mentioned a few times as being different from Western Europe, which may suggest that the Europe imagined and dreamed about by these students was mostly identified with Western Europe:

I expected the Soviet bloc country, however, I was completely surprised when I came to Hungary. It was like an image of Europe I had in my mind before. I couldn't believe that it's me standing here right now (Sardar).

Acculturative stress, caused by the geographical, language and cultural distance between the two countries, also affected the students' adjustment at the beginning of their sojourn in Hungary. These initial days there

were described vividly by one participant as a clash between 'expectations' and 'reality'. The sentiment encapsulates the overwhelming experience many faced during their early days in the country. For most participants, the difficulties ranged from overcoming language barriers to managing financial constraints and adjusting to local cuisine. Fariza reported the struggle: 'Challenge is having a language barrier with other people. I don't know Hungarian, so it's hard to understand what is going on'. Despite the linguistic barriers, she expressed gratitude towards the locals for their assistance, recounting instances where fellow Hungarians stepped in to translate, even during simple tasks like explaining purchases at the cash desk.

Culinary differences posed another obstacle, as highlighted by Bek:

Sometimes food can be a problem. Food here is definitely different. For example, we cannot find that much beef here, usually it's chicken or pork. Because I don't really eat pork, not because of religion, I am not religious, I am not just used to eating it.

Moreover, academic pressures added to the strain, particularly for Perizat, who reflected on her time during her preparatory studies:

When I was studying there, I faced significant pressure. I had to handle many responsibilities, including final exams, which often left me feeling exhausted. Learning the Hungarian language throughout the year was particularly challenging.

The feeling of being disconnected from people or things that are familiar can also be quite distressing, whether it is because of a lack of technology to communicate with loved ones back home or due to a lack of contact with those who share a common identity. Mariyam reported feeling ready to leave everything behind and return to Kazakhstan:

When I moved to the dormitory, I had no wi-fi; no one from Kazakhstan or any Russian-speaking countries lived in this dormitory. I felt totally lonely, especially when I saw flying planes from the windows. I called my mom and said: 'I wanna go back home'.

The situation in their home country is a constant frame of reference. Dariya, who completed a preparatory course in the Hungarian language, shared that:

We've been thinking about whether to continue our studies in Hungary because no one wanted to study in the Hungarian language. Choosing between life in Kazakhstan and studying in Hungary, we decided to choose Hungary.

This may imply that, while Hungary as a whole did not meet some students' expectations about life abroad, it was still evaluated as being better than Kazakhstan – as a less-bad option.

Contrasting values

The third theme referred to the perceived cultural differences between the two countries. The differences in cultural values showed themselves best in their perception of gender roles, relationships and, especially, family values.

The Kazakhstani interviewees valued belonging to cohesive in-groups. Relational ties and obligations were deemed crucial. Family values and relationships with members of the in-group played a significant role in the participants' lives, as expressed by Bek: 'Maybe as a Kazakh person I appreciate family values because, for me, family means a lot. (…) I am really interdependent'. Participants also stated that the opinion of society matters in Kazakhstan, which puts pressure on students. The largely conservative society is still sceptical about social changes. More rigorous expectations and standards in terms of gender roles in Kazakhstan are good examples of this phenomenon, as Aizere said: 'I think that, in Kazakhstan, gender roles are more strictly defined than in Hungary. There are pretty strict guidelines and roles based on gender. Hungary is much more liberal and freer'.

Perceived differences between the two countries were reported in terms of parenting and household roles. Participants such as Hadiya stated that marital status plays a big role in Kazakhstan, compared to Hungary: 'Women in Hungary have more independence compared to Kazakhstan. In a relationship, women are treated with expectations in the role of mother and housewife in Kazakhstan. Marital status validates women's existence'.

International students, particularly those at the stage of forming romantic relationships, often face added expectations from their communities and families – especially women, who may feel pressured to balance both their careers and personal lives. In Kazakhstan, there seems to be a constant social pressure regarding marital status and relationships whereas, in Hungary, these expectations are less prominent, allowing women to feel a greater sense of freedom and better psychological well-being.

The similarity in terms of cultural values and mentality played a big role in the choice of a future partner. Students seemed to hold positive opinions about international marriage, although they perceived the strong norms of the home society and the expectations from their families to marry co-nationals. This motivation towards endogamous marriage and the alleged rejection of marriage with someone from outside the national group was reported by several students, like Zhanar: 'International marriage is not acceptable in Kazakhstan. We have some kind of rule that Kazakh should marry Kazakh. (…) If I marry an international guy, my family will not accept it'.

Others, like Aizere, did not mention objections against exogamous marriage but, rather, emphasised the advantage of marriage with an ingroup member: 'I am positive about international marriage. However, I think it is just easier to marry your co-national'. The comfortable feeling with someone from the co-national group was reported not only in a romantic relationship but in friendship as well, as explained in the next section.

An additional cultural difference was found in relation to personal space. Participants stated that a person's background is given greater emphasis in Kazakhstan and people often cross personal boundaries compared to the Western cultures, as Hadiya states:

The main difference is respect for personal space. As a Western country, they know the limits and boundaries that they do not cross. (…) They will not ask how much you earn, what you do, who are your parents and what is your salary. I think it is Eastern and Western cultures.

Life inside a bubble

The fourth theme included factors that influenced the social contacts of the Kazakhstani students in Hungary, as well as the consequences of these social contacts for their adjustment process. The different bubbles (co-nationals and internationals) where our participants socialised the most seemed to differ in depth and closeness of relationship (see the results of our Ego Network analysis, below). These differences were found in sharing the most important issues, organising free time and getting help with solving problems with co-nationals or

internationals. Social contact with host-nationals was found to be rare or even lacking. The comfort of using their native language and meeting people with a similar mentality and culture seemed to be the main factors behind the students' friendship preferences for co-nationals or Russian-speaking international students. Our participants' circle of social contacts was more extensive in the academic environment and also included international peers. However, in everyday life, the students communicated mostly with their co-nationals, as Alan said:

I usually prefer going out with co-nationals. The important thing is to have a common language, rather it is Russian or Kazakh, as it feels more convenient for me to use these languages in daily life. Academically, I am fine using English, which is why I am good with my international classmates.

Some students insisted on the value of their own cultural and ethnic identities and showed little interest in learning about the host culture. This suggests that perceived cultural differences and challenges may have prompted the international students to maintain their co-national ties: 'We made a lot of friends who are Kazakhs and it was like a small Kazakhstan in Hungary. I did not have to adjust to international society when we were going out', as Akan said.

Many students reported not having any Hungarian classmates and mostly studying separately, which did not help to foster communication with local students. This might be another reason why the Kazakhstani students found themselves in ethnic enclaves, as part of a group with a common language and cultural similarities, as Bek pronounced: 'We do not have Hungarian classmates. I am not exposed to Hungarians and do not have a real communication with them, apart from teachers'.

Many participants mentioned being interested in forming friendships with Hungarian students. However, they failed to do so because of a perceived lack of motivation on the part of the local students: 'I am kind of living in a bubble. I do not know a lot about the news and what is going on in Hungary. (…) I would be happy if we could have more opportunities to communicate with other Hungarian students', Aizere said.

It was not only the lack of opportunities for contact with locals but the blatant discrimination they faced and which was experienced by many. Several students felt that they were not 'accepted' or welcomed by the host society. Some participants perceived a lack of belonging and felt themselves to not be an integral part of the Hungarian community. International students studying in Hungarian cities other than Budapest reported a feeling of being rejected, as did Askar.

I feel that I am not part of Hungary, like a 'guest' because I am a foreigner. (…) Sometimes you can see papers like 'No immigrants here'. There is also a picture of internationals and there is written: 'No entrance'.

The factors mentioned above may have led Kazakhstani students to form their own 'cultural bubble' while in Hungary. Social connections with fellow nationals were seen as beneficial for psychological well-being and instilling confidence during their time abroad. Some participants, such as Mariyam, noted that being surrounded by their ethnic peers facilitated a smoother adjustment process: 'My adjustment here went really well and smooth, mostly because of help of people surrounding me (meaning her co-nationals)'.

As one participant suggested, organising meetings between locals and international students at the university level could foster connections and facilitate the international students' integration into the host culture. For sociocultural adjustment, interactions with host nationals were deemed helpful, particularly in terms of learning the culture and language. When asked by the interviewer 'What do you think helps the most to adjust for international students in Hungary?', Perizat answered: 'I think organising meetings between locals

and internationals would help. We shouldn't be separated; we need to have a connection. It should be made at the university level'. As highlighted by this student, such initiatives can bridge the gap between locals and international students, emphasising the importance of connection and interaction for successful integration. This approach aligns well with our exploration of social contacts, which extends beyond interviews to include the analysis of ego network questionnaires.

Results of the ego network analysis

The use of ego network questionnaires provided a comprehensive understanding of how Kazakhstani students in Hungary navigate their social networks and integrate into the host culture. We found that, on average, participants shared their most important issues and problems in Hungary with co-nationals in 67 per cent of cases, with internationals in 23 per cent of cases and with Hungarians in just 4 per cent of cases while, in the remaining 6 per cent of cases, the participants did not mention any social contacts.

In terms of organising programmes and free time, on average, our participants' social networks consisted of 44 per cent co-nationals, 33 per cent international students and 6 per cent Hungarians, with 17 per cent not mentioning any contacts. For getting help in solving smaller or bigger problems, on average our students counted 55 per cent on co-nationals, 26 per cent on internationals and just 1 per cent on Hungarians, while they attempted to solve difficulties on their own in 18 per cent of the cases. Participants' social networks consisted mostly of co-nationals or international classmates, as well as the people they shared a flat with. Having many co-national and international peers and being separated from Hungarian students in the academic environment may explain the lack of social contact with locals. Moreover, the perceived feeling of being rejected by the host society may be another reason for participants' choice of co-ethnic peers.

Discussion

We investigated the adjustment experiences of Kazakhstani students in Hungary and uncovered four thematic areas, each reflecting distinct phases and challenges faced by participants: (1) In search of the best opportunities abroad *(pre-sojourn factors)*; (2) Finding common ground between dreams and reality *(in-sojourn factors)*; (3) Contrasting values *(in-sojourn factors)*; and (4) Life inside a bubble *(in-sojourn factors)*.

In the first theme, we explored how participants' decision to study abroad was driven by a mix of 'pre-sojourn' factors that may impact on their adaptation potential. Several studies have already demonstrated that 'pre-sojourn' factors play a significant role in international students' adjustment process and its outcome–adaptation (e.g. Schartner 2014; Young and Schartner 2014; Young *et al.* 2013). According to Kim (2001), newcomers' adaptation potential largely depends on how well they are prepared to face the changes and challenges presented by the host culture. Moreover, she categorises these 'pre-sojourn' factors under the broader concept of 'preparedness for change'. In the present study the pre-sojourn factors included – but were not limited to – students' motivation to study abroad, building intercultural competence, prior intercultural experience, prior expectations, dissatisfaction with the socioeconomic and political situation back in the home country, the quality of the education on offer and future opportunities for self-development, travel and employment.

According to Nilsson and Ripmeester (2016), the most important reasons for international students to study abroad were broader experience, higher-quality education and improved career prospects. In our study, the students' answers echo the idea that their meritocratic pursuit of a better life and education abroad served as a key motivator, potentially shaping how they perceive the challenges of adjusting to a new environment. This greater motivation to study abroad might be a good predictor of several adjustment outcomes (sociocultural

adaptation, psychological adaptation and academic adaptation), as demonstrated in the study by Chirkov, Safdar, Guzman and Playford (2008) on the role of motivation in international students' adjustment.

We found that prior intercultural experiences of studying and living abroad were another motivating factor for participants applying to study in Hungary. Participants with prior overseas experience often compared life and education in Kazakhstan to in of the 'Western world', using it as a reference point. This previous exposure may have sparked their desire for international education and potentially eased their adjustment process, as they had undergone similar transitions before. Empirical evidence from Schartner and Young's (2016) study showed that those international students with previous intercultural experience performed better academically than those without this experience. Moreover, Kazakhstani students with prior overseas experience might possess greater intercultural competence, enabling them to interact more effectively with diverse groups and adjust more easily to new environments.

Social and political factors, along with an unsatisfactory quality of life in Kazakhstan, emerged as the primary motivators prompting international students to seek opportunities in Hungary. Additionally, participants cited dissatisfaction with the quality of education in Kazakhstan as another significant push factor. This dissatisfaction stemmed from issues such as irrelevant curricula, low-quality teaching standards and a lack of updated study materials. Furthermore, a shortage of professional teachers and the persistence of the remnants of Soviet education were also mentioned.

For our participants, the 'imaginary dimension' of living abroad was the belief that it would be of better quality than life in Kazakhstan. A marked contrast between Kazakhstan and Europe was perceptible in participants' responses, with Hungary representing the midpoint between the two. Although Hungary as a whole did not fully meet some students' expectations regarding life abroad, it was still perceived as a preferable option compared to Kazakhstan and evaluated as a less-unfavourable choice. The 'Europe' the students dreamed of was predominantly associated with Western European countries. Our findings echoed the idea of perceived contrast between 'post-Soviet states' and the 'Western world' of our previous study conducted on the academic adjustment of international students from post-Soviet countries (Yerken and Nguyen Luu 2022).

In the second theme, we identified in-sojourn factors that develop during the sojourn, specifically challenges related to participants' psychological and sociocultural adjustment. These included overcoming language barriers, coping with financial difficulties and adjusting to the local food. The first months in the new country proved particularly demanding for the international students, with the first semester marked by additional academic stress. These findings are consistent with the results of qualitative research carried out in the United States, where international students experienced 'change overload' (weather, food, academic expectations and social differences) that contributed to their adjustment difficulties (McLachlan and Justice 2009). Earlier qualitative research also found that Kazakhstani students experienced difficulties in adjusting to a new dietary and academic environment in Korea (Choi and Kim 2014).

It is well known that difficulties stemming from the cultural distance between the host and the home countries can result in acculturative stress, which is defined as 'a special kind of response' to the challenges generated by intercultural contact in the process of acculturation (Berry 2019: 15). Nowadays, researchers prefer the term 'acculturative stress' to 'culture shock' because the latter implies only a negative meaning, focusing only on stressors and undermining a person's ability to deal with them. Sojourners who settle temporarily in the host society may experience higher levels of stress since they have no established social support (Berry, Kim, Minde and Mok 1987). Temporary separation from family and relatives and their unfamiliarity with the host society result in uprooting stress, which encompasses a variety of psychological symptoms (Szabó, Ward and Jose 2016).

In the third theme, we explored in-sojourn factors arising from perceived cultural differences, particularly regarding gender equality, social norms, relational ties and family values between the two cultures. The

influence of national culture and traditions was noticeable in the friendship and marriage preferences of most of our participants. Family values and relationships with members of the in-group play a significant role, where social interdependence and harmony are valued. These results correspond to those of a large cross-cultural study by Hofstede *et al*. (2010), which reported that Kazakhstan ranked lower on the individualism dimension than Hungary (scores of 20 and 80, respectively). A Kazakhstani's self-image is defined in terms of 'we' and people belong to cohesive in-groups. Similar results were found in a study of Russian-speaking international students in Hungary, who also experienced a relative cultural distance between Hungary and their home countries, including Kazakhstan (Samokhotova 2018).

According to Demes and Geeraert (2014), values and beliefs (such as perceptions of right and wrong), social norms (like appropriate public behaviour) and family life are key components in measuring sociocultural adjustment. Unfortunately, there is a noticeable lack of research on relationship dynamics, marriage preferences and family values within the adjustment literature, despite its importance. For many international students, particularly those from collectivist cultures like Kazakhstan, societal and familial expectations around marriage remain highly influential. These expectations often emphasise maintaining cultural traditions and adhering to family values, which can be a source of stress or conflict when students encounter the more individualistic norms of their host country, such as Hungary. In Hungary, the reduced emphasis on marital status and the freedom to form relationships based on personal preferences provide a stark contrast to the social pressures many students experience in their home country. This lack of social pressure in Hungary may have a positive influence on students' psychological well-being. However, for those without prior intercultural experience, the process of sociocultural adjustment may prove more challenging, as it could take longer to acquire the necessary skills, attitudes and behaviours with which to navigate and adjust to the new environment effectively. This connection was identified through member-checking discussions.

Presumed similarities in mentality and culture played a significant role in the choice of a future partner for most participants in our study. Although international marriage is not new in Kazakhstan, it is still not widely socially accepted and young people are encouraged to marry co-nationals. This can perhaps be explained by the essentialisation of the concept of ethnic identity, which is characterised by 'groupism' or a tendency to treat ethnic groups as strongly homogeneous and bounded (Brubaker and Cooper 2000). The aspiration to ethno-cultural continuity, which involves maintaining the ethno-cultural heritage and transmitting it to the younger generation (Lamy, Ward and Liu 2013), is connected with essentialist thinking and the perception of ethnicity and nation as entities. Continuity-enhancing behaviour prevails among the 'small people' population, those who 'have faced different degrees of existential uncertainty' to ensure ethnic identification and cultural transmission (Lamy *et al*. 2013). Kazakhstan has a relatively small population – 20 million people – and declared its independence only 33 years ago. This might demonstrate a potential factor behind participants' motivation for ethno-cultural continuity.

It seems that participants in our study perceived a lack of acceptance from the host country and a strong endogamous motivation from family members back home, especially in selective dating and marriage preferences. Reasons for applying endogamy to marriage might be considered in the framework of minority integration, where the heritage culture is maintained in the private domain and the culture of the host society is preserved in the public domain (Lamy *et al*. 2013). According to the model of domain specificity, an individual's choice in terms of acculturation may differ depending on the specific situation (Rosch and Lloyd 1978). Many participants in our study chose separation as an acculturation orientation in the private domain. In terms of education, which belongs in the public domain, participants were longing to be in 'Europe' which, as mentioned above, was perceived as more attractive and offering a better quality of education. A recent study on the academic adjustment of international students from post-Soviet countries demonstrated that students perceived Hungarian education (Hungary is seen as a Western-oriented country) as more 'modern', with better

quality and also made a distinction between 'post-Soviet' and 'Western' education (Yerken and Nguyen Luu 2022). Similarly, Arends-Tóth and van de Vijver (2004) found that Turkish-Dutch migrants maintained their Turkish culture in the private domain and their Dutch culture in the public domain.

In the final theme, we examined in-sojourn factors, focusing on the participants' social contacts and their impact on the adjustment process. The results of both the ego network and thematic analyses demonstrated that co-nationals played a significant role in the lives of Kazakhstani students in Hungary. Despite having a strong desire to go 'abroad' and expectations of a better quality of life for the duration of their studies, interviewed Kazakhstani students mostly ended up in a bubble of ethnic peers and sometimes of international students. Many students communicated with co-nationals or Russian-speaking peers as well because it was more convenient linguistically. The shared legacy of the communist regime and similarities in the education system may also be important elements within the same language community. Similar results were found in the study by Szabó et al. (2020) in which international students who mostly connected with co-national peers represented the largest group in Hungary. These international students indicated positive psychological outcomes, similar to the case of those with mixed social contacts (e.g. having contacts with both co-nationals and locals or both co-nationals and internationals) and which emphasised the important role of co-national support. Although living in an ethnic enclave may provide a sense of confidence and security and might be beneficial for psychological adjustment, greater participation in the host society can foster sociocultural adjustment (Szabó et al. 2020; Ward and Kennedy 1993) and reduce acculturative stress (Berry 2019).

As mentioned above, people's ethnic identities can be one of the factors for the maintenance of heritage culture and the tendency towards the majority culture in Berry's framework (Brown and Zagefka 2011). From the results of our analyses, we can assume that the essentialist thinking and perceived outgroup rejection could explain why most participants in our study chose cultural separatism and 'ended up' in ethnic enclaves. Furthermore, endorsement of the separation strategy by the host society may strengthen a belief in established cultural differences between the host and home cultures (Brown and Zagefka 2011).

When faced with multiple challenges, some participants noted that, in Hungary, they started to value their own cultural identity and traditions more than they did in Kazakhstan. This can be explained by the 'cultural encapsulation' phenomenon, a process by which individuals preserve ethnic cultural values to an even greater extent than people living in their homeland (Kim, Yang, Atkinson, Wolfe and Hong 2001). Kazakhstani students in the USA had a very similar international experience: their patriotic feelings were enhanced and they were motivated to preserve their cultural heritage (Baltabayeva 2019).

We also asked our participants whether their plans had been realised and their expectations met in Hungary. Many reported that their expectations had been fulfilled. However, having more social contacts with co-nationals or Russian-speaking students, most of the participants had fewer intercultural experiences and fewer opportunities to improve their language skills than they had expected.

Limitations and future implications

Some of the interviews were conducted in English, which may have limited the respondents' ability to fully share their personal experiences. Due to resource constraints, the research project was unable to allocate funds for professional translators. Despite this limitation, the authors made every effort to maintain accuracy and fidelity to the original meanings expressed by the participants during the translation process. However, it is acknowledged that the full accuracy and trustworthiness of the translated transcripts may not have been entirely ensured. Subtle meanings and nuances may be lost.

Although we selected participants with similar characteristics, our sample was not homogeneous. Some participants had previous intercultural experiences, which may have affected their adjustment process. The

present research contributes to the limited literature on international students from post-Soviet countries, providing findings on this under-represented population in the Hungarian and Eastern European contexts. We found that participants seemed to hold beliefs about life abroad, which they expected to be of higher quality compared to Kazakhstan. There was a general acknowledgment of the many contrasts between the post-Soviet country and the 'West', with Hungary representing a midpoint between the two opposites. We think further research on international students' perception of two different worlds, 'East' and 'West', is needed, especially in a non-Westernised context.

The present study showed that, in the private domain (marriage, family, etc.), the Kazakhstani students essentialise their ethnic identity and preserve their ethno-cultural heritage. It would be important to further investigate the concept of ethno-cultural continuity among international students and its relation to marriage preferences.

While longing to be abroad and preferring a 'Western-style' education, the most of the participating students still socialised more with their co-ethnic peers. We found that co-nationals played a significant role in the students' social lives, while the convenience of the native language was another important factor. We recommend conducting quantitative research to investigate the association between various factors (e.g., ethnic identity, social contact, acculturation strategies) and the adaptation experiences of international students from post-Soviet countries. It would also be important to conduct cross-national comparisons to explore the adjustment and adaptation experiences of these groups of students and to investigate cultural differences.

In the adjustment literature, we need to broaden research beyond the examination of personal factors affecting international students. It is crucial to shift the focus towards exploring the diverse array of contextual factors, thereby alleviating the sole responsibility of students for their adjustment processes. The findings on cultural distance in terms of gender roles, marriage prospects and family are quite new in the context of a study of international students' adjustment process. Thus, we think that future research should focus on the ecocultural context of both home and host countries. Understanding cultural differences within an institutional context would help universities to tailor their support services more effectively, fostering a more inclusive and supportive environment for international students. It would also empower institutions to enact meaningful changes that positively impact on the experiences of international students.

We recommend that Hungarian higher-education institutions foster a more favourable English-speaking environment for international students, while also providing opportunities for them to learn the Hungarian language. Additionally, forming mixed groups of international and local students would be important to facilitate communication and promote successful integration.

Conflict of interest statement

No conflict of interest was reported by the authors.

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Transnational Field of Dispersed Diasporas: The Czech Case

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The text shows how the transnational field of Czech skilled migration to Western European countries and to developed non-European countries is constructed. It works with quantitative and qualitative data on the Czech diaspora and creates a variant of a transnational field with links to formal institutions on the one hand and personal contacts based on family and friendship ties on the other. It weighs where and under what conditions institutions and friendly connectivities play a role and shows a variety of networks where institutional ties play a crucial role in the target countries. The study indicates that these skilled migrants follow patterns of mobilities between Western EU countries. However, it has been more pragmatic, less focused on the quality of the environments in the destination countries and more direct on building personal social capital. The text shows that the Czech diaspora is highly dispersed yet capable of social mobilisation for joint activities.

Keywords: emigration, Czech diaspora, Czech Republic, transnational fields

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Introduction

The European Union's area creates a specific migration environment with porous borders allowing multiple migration movements and free choice of residence, which results in extended transnationality. Specifics of this type of mobility have been studied since approximately the 1980s (Carling and Erdal 2014; Delhey, Verbalyte, Aplowski and Deutschmann 2019; King 2002; Koikkalainen, Lulle, King, Leon-Himmelstine and Szkudlarek 2022; Salt 1983, 1992). It is multiple and highly individual, with frequent return migration and repeated trips to new destinations (Erlinghagen, Ette, Schneider and Witte 2021; Harney and Baldassar 2007; King 2002; Koikkalainen *et al*. 2022; Recchi and Favel 2019; Tedeschi, Vorobeva and Jauhiainen 2020), which 'blur further the never-straightforward boundary between migration and mobility' (King 2002: 90) and draws 'stayers' into the concept of transnationalism (Recchi and Favell 2019; Tedeschi *et al*. 2020). At the European level, the processes associated with these migratory movements are sometimes called 'horizontal Europeanisation' (Heidenreich 2019). However, this type of migratory movement is not limited to Europe; it is recorded to varying degrees between Europe and other parts of the world. Residents of Czechia partially joined this migratory environment in the 1990s with the dismantling of the communist regime – and entirely in 2004 with the accession to the European Union. Before 1989, Czechia also experienced various migratory movements but the state strictly regulated immigration and emigration, so these were usually one-way. Transnationalism and contacts of residents in Czechia with diasporas abroad were limited.

The impact of new migration conditions and changes in the characteristics of Czech diasporas are understudied. While there have been several comprehensive publications on emigration up to 1989 (Brouček, Barteček, Beranská, Grulich, Jakoubek, Kočí, Lozoviuk, Sulitka and Uherek 2019), analyses of new out-migration trends especially are predominantly probes concentrated on partial cases (Brouček, Beranská, Červinková, Jiráková and Uherek 2017; Brouček *et al*. 2019; Drbohlav and Pavelková 2018). It is only recently, in light of the growing political interest in the Czech diaspora in Czechia, that more robust data have been collected there, as evidenced by the publication edited by Eva Janská, with a foreword by the Czech politicians Jiří Bělor (Deputy Chairman of the Subcommittee on Relations with Compatriots of the Chamber of Deputies of the Parliament of the Czech Republic) and Jiří Krátký (Special Envoy for the Czech Expatriate Community and Expatriate Affairs at the Ministry of Foreign Affairs of the Czech Republic) (Janská 2024) and efforts to contextualise policy towards the Czech diaspora within current international trends (Janská and Janurová 2020; Janská, Janurová, Löblová and Novotný 2024). The primary motivation of these texts is to map what the diaspora needs from the institutions in the country of origin and to strengthen the link between them. The 2024 publication, edited by Eva Janská, also includes chapters that analyse in more detail texts that have been written about the original Czech diasporas (Janská, Uherek and Janurová 2024); however, a more complete picture of how Czech transnationalism is ordered is still lacking. We address this question in the following text.

In order to grasp transnational behaviour from different points of view, a number of concepts have been developed. Prominent among these are concepts of transnational (social) space, the transnational field and transnational habitus. All three concepts have been utilised in a variety of meanings in the past and their very use has been already analysed and evaluated (regarding transnational space, see Pries 2001; Riaño 2017; the transnational field, Lubbers, Verdery and Molina 2020; transnational habitus, Stahl, Soong, Mu and Dai 2024). These three concepts include three dimensions of socially produced space: materiality, social practice and meanings. While the concept of transnational space refers predominantly to the sociospatial (sociocentric) dimension of transnationalism (Pries 2005) and includes a variety of perspectives (from individual to institutional plurilocal frameworks – Pries 2001), the transnational field refers to its personal, egocentric (perceptionalist) dimension (Fouron and Glick Schiller 2001; Lubbers *et al*. 2020; Molina, Petermann and Herz 2015). The transnational habitus then includes transnational practices and powers that migrants activate

(Guarnizo 1997; Stahl *et al.* 2024). In this text, we focus primarily on the egocentric dimension of the transnational field constructed through actors' responses to the questionnaire survey and narratives in the in-depth interviews. In constructing the transnational field, we considered that many diaspora members go abroad to work or study and maintain primarily work and study relationships abroad rather than relationships with diaspora members. This circumstance is often overlooked when studying the transnational field (Lubbers *et al.* 2020). In so doing, we ask ourselves the following questions:

- How is the transnational field of our samples constructed and how important is the role of formalised relationships between individuals and institutions compared to informal relationships with family, friends and acquaintances?
- How are the state institutions in the country of origin embedded in the transnational field?
- Do individuals of dispersed transnational fields form a diaspora?

In the following discussion, we place the results of our analysis in a broader context.

In approaching these questions, we use the concept of transnationalism as a transnational 'set of multiple interlocking networks of social relationships through which ideas, practices and resources are unequally exchanged, organised and transformed' (Levitt and Glick Schiller 2004: 1009). The term 'diaspora' we understand, following Robin Cohen, as a defined group whose members are dispersed to many destinations – they construct a shared identity; they still somewhat orient themselves to an original 'home' and they demonstrate an affinity with other members of the group dispersed to other places (Cohen 2023: 1).

Data and measures

Basic strategies for transnational field research

In conceptualising the transnational field, Fouron, Levitt and Glick Schiller all drew on Bourdieu's (1993) notion of a field of social (power) relations which, in line with the Manchester School of Social Anthropology, can be represented as a social network. When this concept is applied to migration groups, the field encompasses at least 2 locations, destination and source countries – and creates a network of (at least 2) networks (Levitt and Glick Schiller 2004; Molina, Petermann and Herz 2012, 2015). In this paper, we conceptualise the social field as egocentric. It consists of the individuals (Egos) and their personal contacts with individuals and institutions – the subjectively perceived ties with significant others that anchor Ego in society (Goffman 1961).

To explore the transnational field, we used a mixed-methods approach combining quantitative and qualitative data sources (Creswell 2014; Lubbers *et al.* 2020; Teddlie and Tashakkori 2009).

Data

The data for the quantitative evaluation were obtained through a questionnaire survey collected as part of the project Research on the needs of compatriot communities in individual countries in terms of maintaining their ties to the Czech Republic and analysed for the purposes of this text during the project Czech diaspora – Multidimensional relations and conditionality of Czechia and host countries. The questionnaire survey was conducted from May 2021 to September 2021 and was intended for adult Czech citizens or persons of Czech origin who had been abroad for at least 6 months. A person of Czech origin could be anyone with Czech ancestry, regardless of citizenship or country of birth. The important thing was that they did not live in the Czech Republic.

The questionnaire was distributed in electronic form. Czech associations abroad, Facebook groups and the organisation Czexpats in Science were addressed and individuals were contacted to fill it in via the Czech Compatriots web portal (Cestikrajane 2021). Through this sampling method, 940 questionnaires were completed. These were collected by institutions residing in the source country (Charles University, the Institute of Ethnology of the Academy of Sciences, the National Institute for Research on Innovative Technologies and the Czexpats in Science NGO). The distribution of the questionnaire allowed the participation of all segments of the diaspora, bearing in mind that the distribution of the questionnaire gives room for self-selective processes and attracts active and communicative individuals.

According to the estimates of the Ministry of Foreign Affairs, there are currently 2–2.5 million people of Czech origin living abroad (MZV 2023a, 2023b), of whom approximately 290,000 have Czech citizenship; the rest claim Czech origin despite being citizens of other countries (MZV 2023a). According to the Ministry of Foreign Affairs, the most frequent destinations of Czechs abroad are the USA, Great Britain and Germany (MZV 2023a). Our transnational communication was accepted predominantly by Czech citizens (883 out of 940 respondents participating in the survey – i.e. 93.9 per cent). These respondents lived previously in Czechia. The average age of the sample was 43 years (median 40 years, range 17–93 years), with the most significant number of respondents aged 37–53 years (st. dev. 13.279). They lived in Czechia for an average of 26.96 years (median 25). If we assume that they were born in Czechia (a question unfortunately absent in the questionnaire), it is apparent that they left primarily between the ages of 19 and 35 (n=921, missing 19, st. dev. 7.922). At the time of the research, they were living in 53 countries. Most resided in the United Kingdom (166 respondents, 17.7 per cent), Germany (163 respondents, 17.3 per cent), the USA (143 respondents, 15.2 per cent), Canada (58 respondents, 6.2 per cent) and Austria (49 respondents, 5.2 per cent). The migratory movement of respondents, however, was not so simple. Qualitative research shows that respondents' first departures abroad were often realised at younger ages (Uherek, Beranská 2024). The length of stay abroad varied considerably, ranging from 6 months to 71 years. Still, the average stay abroad was 15.6 years, the median was 12 years and most respondents had been abroad between 3 and 30 years (standard deviation 13.04).

Another important characteristic of the sample is education – 60 per cent had a university degree (at least BC) and 24 per cent had a PhD. There is an obvious bias here: the questionnaire was also partially distributed through the networks of Czexpats in Science with special questions for highly skilled diaspora members. However, although this circumstance probably boosted the number of university-educated respondents, it is clear that the communication with researchers through the questionnaire was carried out predominantly by educated and qualified people. It is important information for the academic sphere and the state administration because these people usually save time. If they devote it to creating feedback to the country of origin, it cannot be considered a mere sentiment but a thoughtfully designed part of the transnational field in which they set particular aspirations.

The quantitative enquiry was followed by the qualitative one, based on online and face-to-face interviews conducted from January 2022 to July 2024. The sample contains 109 narratives based on semi-standardised questions about the reason for going abroad, life and integration abroad, future plans and contacts. The sample is predominantly based on self-selection – 90 interview partners are respondents of the questionnaire survey who expressed their willingness to be subsequently interviewed by a research-team member. This core corpus of data was then supplemented by purposive sampling through interviews conducted during fieldwork and by directly approaching narrators with whom the researchers came into contact.

While the questionnaire survey did not limit the country where the respondent was located – the researchers only ensured that the countries with the most significant number of Czech diaspora members were proportionally represented – the qualitative research focused on only a few countries with a sizeable Czech

diaspora. Interviews were thus conducted with Czechs in Germany, France, the UK, the USA, Australia and New Zealand.

Measures

In addition to basic personal data, the questionnaire focuses on the reason for staying abroad, which is, in this text, an indicator of the reason for the creation of the transnational field. Then follow the questions about the respondents' relationships with individuals (family members, friends, acquaintances) and formal institutions (offices, schools, voluntary organisations, clubs, political groupings) and the frequency of these contacts (respondents selected whether they had daily, weekly, yearly, less than yearly or no contact with a given category of person or institution). For this analysis, we consider the following indicators:

- contacts at the destination countries and their frequency
- contacts with the country of origin and their frequency

We modelled the transnational field by:

12. simply summing how many people a given contact type has in the sample and, next,
13. adding an index number as an auxiliary tool.

As demonstrated below, this operationalisation allows for at least a partial refinement of the transnational field we have created. A symbolic expression could be as follows:

$$I = \frac{n_c \cdot t_c}{n \cdot t_{max}}$$

I = index number
n_c = number of respondents that participate in a given category of contacts
t_c = mean of participation in the activity for those who participate
n = total number of respondents (n=940)
t_{max} = total number of contact units (t_{max}=365)

For instance, if the contact is used once every 2 years, we report 0.5 annual contacts. In the case of full-time employment, we have calculated, for instance, t_c = 240 working days per year and n_c = 760 respondents were employed or studying. The resulting index number was, therefore, $I \approx 0.53$. From the symbolic notation and interpretation, it is clear that the index number can take values from 0 to 1, where 1 is the maximum number of contacts and 0 is no binding. The significance of this number is only to show the rough proportions between the included categories of contacts.

We used qualitative research to illustrate the quantitative data. From the narratives collected, we selected passages related to reasons for migration, mutual contacts and future aspirations, which reveal the use of the transnational field and show what the data collected through quantitative research means. The qualitative analysis in this text makes it possible to understand the specificities of the transnational field and to interpret the quantitative data.

Bi-national and institutional/private tracing

Data obtained by queries to construct a transnational field can answer many diverse questions. Since our research questions ask about the role of formalised institutions in forming the transnational field, we construct a transnational field that considers contacts with formalised institutions and informal contacts that arise on a friendship or kinship basis separately. Although these contacts may include multiple countries, interviews and questionnaire surveys have shown that they are almost exclusively concentrated on our sample's destination and country of origin. That is why the transnational field is concentrated on these 2 destinations. The transnational field, as shown in Graph 1, therefore has 4 sections. The top left is the institutional section of the destination country, the top right is the private section of it; the bottom left is the institutional section of the country of origin and the bottom right is the private section of it.

In this text, we do not study individual contacts but categories of contacts. That is why we did not use a name generator. In the questionnaire, we ask about the frequency of contacts with acquaintances, relatives and institutions. A specific category of relations is diaspora associations which, while located in the target destination, refer to the source destination. Entrepreneurial activities are linked in the narratives to the private and institutional spheres. Therefore, in Graph 1 they interfere with the institutional and private spheres. We separate them into a specific category. All quantified data (from quantitative and qualitative surveys) were processed using SPSS software 29.0.1.0. Qualitative data were coded partly manually and partly using Atlas ti 23. We make the results available in tables and simultaneously present them in the form of a sociogram. The egocentric network that emerges in this way speaks not only to the Ego's relations to categories in the transnational field but also to the Ego's relations to itself and its goals and aspirations (Ryan 2024; Scott 2017; Silver and Lee 2013).

Results

Institutional and professional links in the destination country

The quantitative research (n = 940) summarised in Table 1 shows that more than half of the respondents left their country of origin because they were attracted by ties falling into the institutional rather than the private sphere.

Table 1. Reasons for migration (n = 940)

Reason for migration	Per cent
Work, employment	28.3
Private (family, partner)	36.0
Education, qualifications	22.6
Political	9.9
Other	3.3
Total	**100.0**

This corresponds to the current economic status of the respondents ascertained in the quantitative survey (n = 940), where 9 per cent reported being in education, 30.9 per cent were employed in the private sector and 20.3 per cent in the public sector, while 11.3 per cent were in business.

Qualitative interviews (n = 109) showed us that respondents usually contacted foreign institutions independently before going abroad. Mediation by an agency from the Czech Republic was also recorded but,

more often, we observed respondents' independent and active initiatives. We select illustrative examples from the qualitative research:

- departure for Erasmus during Bachelor's studies, return to the Czech Republic and subsequent Master's and doctoral studies abroad, with continued employment (male, 33 years old, university education, Australia);
- studying in the UK after high school in the Czech Republic and then staying abroad (female, 41 years old, high-school education, New Zealand);
- after high school, *au pair* (agency placement) in the UK, then return to the Czech Republic, travel to the same country for a more-qualified high-school position and then Bachelor's studies in the UK (female, 41, university education, UK); and
- MA study in the Czech Republic and subsequent internship abroad, return to the Czech Republic and then following PhD study abroad (male, 29 years old, PhD, USA).

The interest in studying and improving qualifications as a primary (acknowledged) motivation for going abroad also reflects agencies providing short-term low-skilled work. The value hierarchy verified by the questionnaire survey and qualitative interviews is summarised by the advertisement of the company mediating employment abroad:

14. Work <u>experience</u> abroad is not only a great item for your CV but also a way
15. to <u>get to know the world</u> and see places that most Czechs do not even dream of. Thanks to a work abroad opportunity, you will
16. <u>become independent</u>, learn to rely on yourself and
17. make <u>contacts</u> with people worldwide.
18. <u>Improving your English and other languages</u> is a matter of course, as well as
19. <u>earnings</u>, which are hard to achieve in the Czech Republic (Czech-us 2023) (underlinings and figures inserted by ZU).

It is clear from the advertisement that even employment agencies do not primarily attract customers to financial resources but to *social capital*, which includes knowledge, qualifications and social ties.

The survey results differ from the data obtained in Poland in the 1990s, where existential reasons and earnings are identified as one of the most significant push factors initiating foreign migration from Poland (Morawska 2001). However, if we consider highly qualified migrants here, the situation is also ambivalent and the structure and interests of migrants are changing, among other things, due to the increase in student departures (Kaczmarczyk 2010). The motivational factors identified by Sasnal (2023) are then almost entirely consistent with our findings.

Institutional links to the source country

While the institutional attachment to the target destination is shaped mainly by education and employment, the institutional attachment to Czechia is primarily formed by citizenship and local belonging. Our respondents also needed to secure residency status, housing, tax and insurance obligations in destination countries during their stays abroad. Nevertheless, these themes have been emerging, mainly concerning the Czech Republic. It was partly due to the position of the researcher – who focused on these topics and was sometimes asked for

advice – and partially because the bureaucracy at a distance from Czechia is not developed and functions poorly. Czechs living abroad, therefore, choose several strategies for this institutional link:

- keep it to a minimum (check out of residence, leave asset management to others); and
- deal with official matters during their stay in the Czech Republic.

Selected frequencies of institutional contacts are shown in Table 2:

Table 2. Frequencies of visits to particular institutions of the Czech Republic (n=940)

Institution	Frequency of contacts in valid per cents				
	Never	Maximum once a year	Several times a year	Several times a month	Total per cent
Tax authority	78.3	17.0	4.2	0.4	100.0
Social Insurance Office	76.7	19.2	4.1		100.0
Office for Czechs Abroad (Ministry of Foreign Affairs)	93.3	4.0	2.3	0.4	100.0
Commission for Czechs Abroad in Senate of the CR	94.5	3.0	2.5		100.0
Local municipality in CR	49.0	43.0	7.5		100.0
Consulate	42.5	43.8	13.6		100.0
Embassy	69.1	23.0	5.9	2.0	100.0

Institutionalised economic ties linking residence abroad and the Czech Republic, such as doing business in both countries, are also not widespread. Some 80.3 per cent of respondents declared that they were not involved in any economic activities in the Czech Republic (n=940). Few had entrepreneurial activities (a share in a company, ownership of an economic unit, 3.7 per cent). The exception is the academic level – membership of scientific boards, committees, joint grants or lectures in the country of origin. Cooperation also reported respondents who work abroad in the field of human rights or as honorary consuls. Individuals also occasionally taught languages and participated in cultural events. In total, 16 per cent of respondents reported some other non-business transnational activities. A bank account or a data box often linked them to Czech institutions.

It is clear from the list that, after leaving the Czech Republic, the transnational link in economic activity, association activity (except diaspora associations, which Czechs abroad sometimes contact only after leaving) and political activity weakens significantly. However, interest in the right to vote remains.

The transnational field in personal life

Following the qualitative interviews, the choice of place of residence did not coincide with compatriot or kinship relations – some 90.4 per cent of respondents knew nothing about Czechs in the area in which they lived before coming, with 9.6 per cent even claiming that they did not intend to seek any contact with Czechs. However, they left behind friends and relatives in their country of origin. They are in contact with families, especially parents and siblings – the most important transnational link to the source country, although primarily emotional, sentimental and symbolic. All participants in qualitative and quantitative research had such a link, albeit with varying intensity. Together with the relationship to the landscape, the means of communication and the friendly relations, it was an attractor that could play a significant role in the decision about whether to stay abroad or to migrate back.

However, many respondents also built similar ties abroad. The personal reason for going abroad or following the partner was declared by 36 per cent of the respondents in the quantitative survey (n=940). The partner relationships were sometimes already formed before previous stays abroad. As the following table shows, although approximately two-thirds of Czechs were leaving Czechia single, more than 70 per cent of the respondents (n=940) were living in a marital or partner relationship at the time of the survey (as shown in Table 3.

Table 3. Marital status (n = 940)

Marital status	Frequency	Per cent
Divorced	75	8.0
Single	140	14.9
Married	495	52.7
Widowed	27	2.9
With partner	193	20.5
Do not answer	10	1.1
Total	**940**	**100.0**

Some of the new relationships were established with foreign partners. Separated couples (one in the source and one in the destination country) are uncommon in this sample. A significant proportion of respondents established nuclear families (or partner relationships) after going to their destinations. Some of these relationships are with a partner from abroad, some with a partner from Czechia. The qualitative interviews show that approximately half of the mixed marriages are with a partner from the destination country, creating a cosmopolitan transnational field with them. The preference for mixed-marriage partners cannot be determined. We indicated partners from Jamaica, China, the United Kingdom, the USA and other destinations. The acquisition of a position abroad and the subsequent search for a partner in the country of origin described in the literature for other groups of migrants (Levitt and Glick Schiller 2004) was not frequently observed in the sample. Couples were engaged in various interest ties in new environments, including compatriot ties that were sometimes significant to them. In this sample, we rarely encountered the chain migration of family members to new destinations.

From the qualitative inquiry, we present some model examples:

- a young woman who travelled privately, found a local partner and subsequently stayed abroad (enrolled in school and found a job) (female, 43, university – BC, USA);
- a young woman who went to work in the UAE, met an Australian partner there and now lives in Australia, where she has upgraded her qualifications (female, 44, MA, Australia);
- a young Czech student couple who were awarded a scholarship in Finland (each in a different specialisation) and, subsequently, both won positions in their professions in UK tenders (male 32 MA, UK);
- a male student who left the Czech Republic to study in Australia and found a Chinese partner there (male 33, MA, Australia);
- a man who broke up with his partner in Czechia, went as a single man to Australia and found a local woman there (male, 51, BC, Australia);

- a young woman who met a US Army officer during a business visit to Germany and now lives with him in the US (female, 35, BC, US); and
- a young woman who went to London to study English, found a partner of English origin and moved with the partner to New Zealand for permanent residence (female, 41, high school, New Zealand).

It is clear from these examples that private partnerships could have several effects on respondents' transnational fields:

- strengthening ties to the new destination;
- extending transnational links and new incentives for migration; and
- creating new cosmopolitan fields.

We only have data about the partner's life from qualitative research. Quantitative enquiry only indicates that 60.7 per cent have children. In some cases, these children create a link to the country of origin and, thus, a distinct transnational field while, in other cases, they embed partners in a new destination. We provide the following examples from the qualitative research:

- a man in Australia who lives in a mixed marriage and whose children no longer speak Czech and have no relation to the father's country of origin (male, 51, BC, Australia);
- a woman who is living in the USA, has children who do not have Czech citizenship and for whom returning to Czechia would be administratively very difficult for all of them (female, 47, BC, USA);
- a man who lives in a mixed marriage in Australia and definitely wants to spend at least 1 year with his child in the Czech Republic to train her in the Czech languages and enable her to gain new experiences (male, 33, MA, Australia); and
- a couple from a Moravian village who returned to the Czech Republic after the birth of their child so that their child could grow up in the friendly and safe environment of a Moravian village. They work from home for the London companies where the parents are employed (male, 32, MA, UK). We include this case because it is a specific type of transnationalism, where the family has moved to Czechia but still maintains the established institutional ties abroad and does not rule out moving abroad again.

Contacts with relatives are also an important element in the generational transmission of transnationalism. As a private Czech teacher in New Zealand reported, 'Many families send their children to Czech classes to get along with their grandparents. They come to visit them in New Zealand and are unhappy that the children do not understand them'.

Table 4. Informal contacts in the Czech Republic (quantitative sample N=940)

| Informal contacts in the Czech Republic	Frequency of contacts in valid per cents				
	Never	**Maximum once a year**	**Approximately 4 times a month**	**Several times a week**	**Total per cent**
Family members	3.6	14.1	28.2	54.0	100.0

In addition to family relationships abroad, newcomers abroad from Czechia have also formed other relationships with Czechs abroad. Only 17.7 per cent of the respondents in our quantitative enquiry declared that they do not have contact with anyone of Czech origin abroad. These were largely informal contacts,

following Facebook pages or casual meetings, which were relatively marginal for forming the transnational field. However, there are Czech associations abroad with members who regularly visit them.

Overall characteristics of the transnational field for the Czech sample

With the variables used, it is possible to construct a transnational field of the following shape:

Graph 1. Transnational field of Czechs abroad
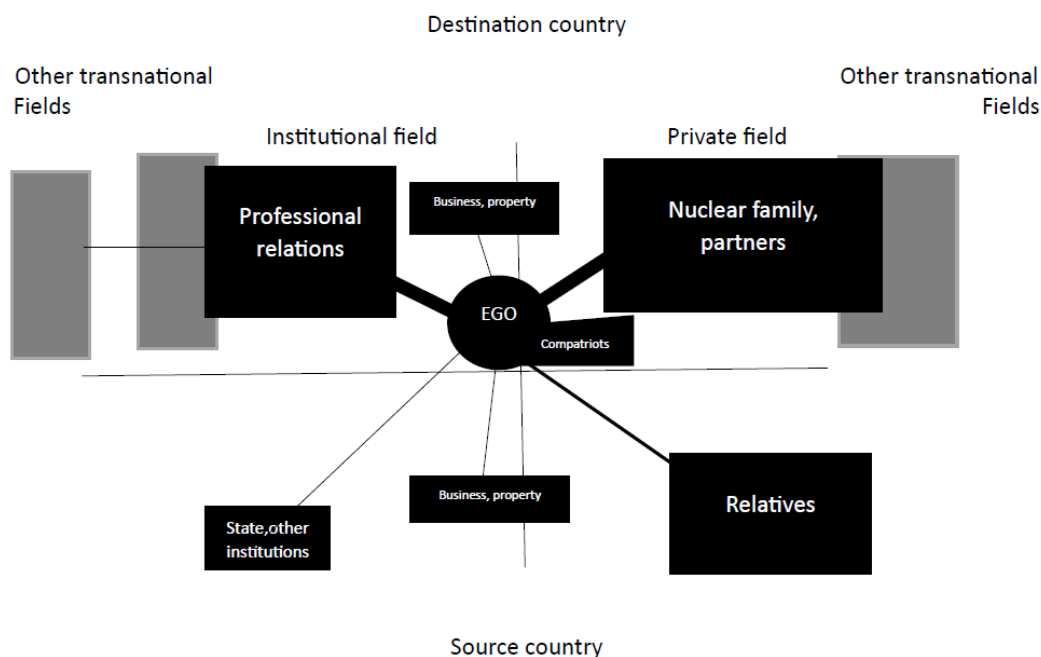
As mentioned above, we have divided the transnational field into four sectors symbolising the types of the Ego's contacts. They are structured by national borders and divided into private and institutional sectors. The size of the black rectangles in particular sectors represents the strength of the Ego's connections to the respective sectors. Given the data available, the strength of EGO's relationship to each category can be considered in several ways. In this paper, we consider the strength of contacts based on 1) the number of respondents that mentioned a given contact category and 2) an index that considers the number of respondents and frequency of usage of a given contact category.

The questionnaire survey shows the importance of family and partner relationships in the destination (73.3 per cent maintain them), as well as relationships with employment and educational institutions, which were the most important reasons for migration for 45.6 per cent of respondents; 78.9 per cent of respondents are employed, doing business or studying abroad. Employment, education and (nuclear) family are also the most important attractors for staying abroad (including salary, which is again linked to formal institutions). From the simple frequencies of each category of contacts, it is also clear that informal contacts with relatives and acquaintances are the strongest link to the Czech Republic (96.4 per cent of respondents maintain contact with relatives at least once a year). Approximately 60 per cent of respondents maintain contact with Czech authorities in the Czech Republic and abroad. Regarding the frequency of contacts, this relationship appears to be the weakest but we do not have data on the importance of these contacts to respondents. Given that they

often commented on the functioning of this relationship in the qualitative interviews and asked for its improvement, it is clear that they attach some importance to it.

The application of an index number increases the difference between the categories. As already indicated in the methodology section, institutional attachment in the destination represented by employment is expressed by an index of 0.53. The attachment to the nuclear family in the destination country (we calculate year-round contact for 74 per cent of respondents) would be represented by 0.74. Attachment to family in the source destination was calculated according to Table 4 = 0.245 and attachment to institutions in the source destination was calculated according to Table 2 = 0.008.

The index numbers show that we have adjusted the size of the institutional field in the source country. This field should be much smaller according to the index score. On the other hand, it is evident from the qualitative research that the importance of this field does not adequately capture the frequency of relationships.

The Ego is placed in the destination part of the sociogram since respondents were emigrants. Ego is eccentrically in the diagram and the more significant part of the Ego is in the institutional zone, as more respondents have institutional than family ties. However, when calculating attachment frequency, the area of the rectangle in the private destination section must necessarily exceed the size of the rectangle in the institutional zone due to the frequency of contacts (we calculate the whole year, 365 days). The areas of rectangles in the destination country are disproportionately more extensive than those in the country of origin and correspond with the frequency of contacts. According to this calculation, the strength of the Ego's relationships in the destination country exceeds the strength of transnational ties to the source country. It also mirrors that a larger proportion of respondents in both the quantitative and qualitative enquiries did not consider returning to their country of origin, at least at the time of data collection. When respondents were asked if they planned to return to Czechia, 47.8 per cent said 'No' or 'Probably no' and 23.7 per cent did not know or did not answer. Only 28.4 per cent of the quantitative sample (n=940) were seriously considering returning.

The source country rectangles show that private, non-formalised ties are a much stronger attractor for returning to the source destination than institutional ones. However, research in other European countries shows that attitudes towards return migration often do not match the later actions of respondents (Ette, Sauer and Fauser 2021).

We have also reflected, in the diagram, contacts with other Czechs abroad, which were usually established during the stay in the destination country and which can be social and emotional support for the Ego but typically have little influence on whether the Ego stays in the place of residence, moves to another, third destination or returns for some time or permanently to the source country.

In contrast to other conceptualisations of transnational fields, transnational economic and religious practices (Levitt and Glick Schiller 2004) played a marginal role in the Czech case. State and other institutions in the country of origin were important themes in the qualitative interviews and the questionnaire survey. However, the contacts were utilitarian, with little emotional investment. Harney and Baldassar (2007: 193) rightly point out that, even within the transnational field, the state remains 'the guarantor of goods and services to its citizens and is the unit that has political legitimacy in global economic arrangements'. The role of a service institution implies the provision of impeccable services, which are generally only sought when necessary, even though state institutions develop proactive policies towards their minorities abroad (Weinar 2020).

For Czech migrants, in particular, the relationship to formal institutions – and especially to the state in the country of origin – has undergone a fundamental transformation. Whereas, until 1989, the totalitarian state was an essential factor in decisions about whether or not an individual would travel and return (Holy 1996; Kostlán 2011; Okólski 2007; Uherek 2004; Uherek, Beranská 2024), its role has now weakened considerably. However, it is still significant on an instrumental level as an institution that provides service and legitimates

respondents' civic identity. On a symbolic level, it represents the space from which immigrants come. In the sociogram of the transnational field, it not only forms the square at the bottom left-hand corner but also co-creates the horizontal axis that separates the world of 'here' and 'there' and legitimates calling the field 'transnational'. Whereas, before 1989, communication with the state about return was almost impossible for people who chose to live abroad, they now want to communicate with it and are looking for a facilitator to negotiate the conditions under which return or expansion of the transnational field would be efficient for them. At the same time, however, they demand that the state not only provide them with quality service but also represent them well. It is also why we have depicted the area which the state occupies in the constructed transnational field as being more extensive than that represented by the index number.

Transnational fields and dispersed diaspora

The presented transnational field (Graph 1) with marginal compatriot ties raises the issue of the legitimacy of talking about diaspora in this case. The concept of diaspora, however ambiguous, presupposes at least elementary relations beyond the nuclear family (Bauböck and Faist 2010; Cohen 2023; Marinova 2017; Uherek 2017; Vertovec 1999, 2009; Weinar 2020). However, the lack of regular community life does not preclude the occasional social mobilisation, as we have seen in the case of the *We Want to Vote Distantly* initiative. Difficulties in reaching polling stations in embassies without the possibility of electronic or postal voting have mobilised hundreds of compatriots, since 2020, to engage in virtual discussions with the government and parliament of the Czech Republic on the enactment of distance voting (Janská and Janurová 2020). The initiative has its website, coordinators, events and stories (We Want to Vote Distance 2023). Thanks to the initiative of compatriots, the distant vote was enacted in 2024 and will be implemented for the first time in 2026 (Act No. 268/2024 Coll.). Alongside other platforms such as diaspora associations and institutions, *Czexpats in Science* and the *School Without Boundaries* platform, it creates a space for communication that can mobilise people to social action.

Discussion – specificity of the Czech diaspora sample

The enquiry carried out from the source country selected respondents representing a picture of a dispersed diaspora, with a predominance of skilled migrants with a high proportion of university-educated individuals. A similar type of migration has been indicated in Western Europe since the 1980s (King 2002; Salt 1983, 1992) and similar samples describe studies of European migrants to other European Union countries in the European Internal Movers' Social Survey (EIMSS) (Alaminos, Recchi, Braun, Muxel, Tambini and Santacreu 2007) or the PIONEUR project (PIONEUR 2004). The data collected in the PIONEUR research involved 54 per cent of university-educated or currently studying individuals originally from Italy, Germany, the UK, France and Spain, who were, on average, 49 years old. At the time of the research, they had lived abroad for an average of 14 years and had moved there the most often between the ages of 22 and 48 (n=4 901, mean 35, median 31, st. dev. 13.258) (PIONEUR 2007). The similarity of the sample obtained by like sampling indicates that, with a lag of at most 18 years, Czechia generates a similar type of diasporas as the countries studied in the PIONEUR research and, at the same time, that a sampling in which self-selection plays a substantial role generates a sample corresponding to the ideas of the modern migration of skilled emigrants creating dispersed diasporas with a cosmopolitan transnational field. Although we do not know accurately in either case to what extent this sample corresponds to the migrant population from the countries in question as a whole, it gives us evidence of the existence of these diasporas not only in the most technologically advanced countries of Europe but also for Central European countries. At the same time, however, it is a caution to identify such samples as

migration flows generally. Both datasets generated mainly successful migrants and did not include those who have returned and are more likely to have had a negative experience abroad (Braun and Arsene 2009). Also, migrants with fewer qualifications and aiming mainly for higher earnings, as described in other Central European case studies (Drbohlav and Pavelková 2018; White, Grabowska, Kaczmarczyk and Slany 2018), are under-represented in the dataset.

On the other hand, both datasets confirm that the group of educated and successful residents abroad is interested in communicating with their countries of origin not only through kinship networks and informal communication but also through institutionalised channels such as the questionnaire survey.

The lower average age of the Czech population sample may indicate that, in 2004, this type of migration and diaspora migration was more 'traditional' for citizens of Italy, Germany, Great Britain, France and Spain than in the 2022 survey in the Czech Republic. The PIONEUR survey sample mainly contains migration since 1974 (Braun and Arsene 2009: 36), while the Czech Republic sample captures migrants, to the greatest extent, after 1989 and especially after the Czech accession to the European Union in 2004. There is a striking difference between the lengths of stay abroad, which is 14 years for the PIONEUR sample and 26 years for the Czech sample. However, this creates a different pattern in migration from Czechia to European countries and to non-European overseas destinations – short and long-distance migration. In the case of migration to European countries (the sample from the Czech Republic also retained Russia, Turkey and European countries that are not in the European Union), the length of stay of Czech emigrants changed and decreased to 14 years. Still, the age of emigrants remained lower on average – 42 years (n=624). It is clear from these data that non-European migration, at least from the Czech Republic, is more long-term and the movement between source and destination countries is not as intense. However, as far as Europe is concerned, this is essentially the same migration pattern as captured by the PIONEUR project or described for German migrants in a particular study (Heidenreich 2019). It means that, for skilled migrants from the Czech Republic, the boundaries to non-European countries such as the US, Australia or New Zealand are essentially similarly permeable, the only difference being that the circular movement is not so intense.

Respondents from Czechia chose their place to live mainly because of employment (education) opportunities. The strong link between migration and social-capital formation shows that migration in this sample can be framed by social capital and habitus theory. Such migration has often been encouraged by their student mobility, the importance of which has been highlighted many times in terms of the migration patterns of 21st-century migrants (Cairns 2021; King 2002; Riaño, Van Mol and Raghuram 2018; Teichler 2015). The choice of place of residence is frequently utilitarian. The Czech sample does not significantly follow *the environmental preference and retiree migration* typical of Western European states (Kountouris and Remoundou 2016; Williams, King and Warnes 1997). The landscape in narratives of Czech diaspora members frequently created an attachment to the country of origin and was, like relatives, an attractor for return migration or dual residence.

Although the free movement of Europeans across Europe ought to be seen as one of the key dimensions of European integration (Favell and Recchi 2009), we did not observe in the interviews that living outside and inside the European Union created a different perspective of the transnational field for the respondents. Only distance and customs rules caused slightly different opinions.

Conclusion

The data on the Czech case are mainly about skilled and well-established diaspora members in the developed countries of the European Union and overseas. The described mobilities are primarily initiated and directed by formal institutions and oriented towards social capital-building. Considering institutional ties and their

importance for building informal ties in the transnational field, we therefore perceive them as crucial in the study of contemporary migrations. However, the behaviour of the respondents was expectedly also partly motivated by curiosity, the desire for new experiences, partner relationships and economic reasons. The sample we explored develops strong ties to formal institutions in the destination countries and establishes strong informal ties based on nuclear families there. The transnational field is mainly directed toward friends and relatives in the source country. These ties to Czechia are mainly informal, friendly, emotional and non-economic. Ties to formal institutions in the source destination, especially the state, are important but limited to the legitimation of residence and the mutual obligations of the citizen and the state. Thus, it can be said that, for most quantitative and qualitative survey respondents, the transnational field was weaker at the time of the research compared to ties in the destination countries.

Our sample behaved more like dispersed individuals than a diaspora. However, the lack of functioning source state institutions can mobilise migrants to social action. It shows us that even such highly individualised and dispersed migration behaves like a diaspora in specific situations.

The sampling process gave a voice predominantly to a new generation of diaspora members who can communicate electronically and have the will and often the professional skills to articulate their views in offered forms. It does not mean that there are not others who have been left behind communicationally and who also need attention – as was noted, for example, in the project dedicated to Texas Germans (TGDP 2023; Warmuth 2021). Their transnational fields are, of course, different.

Conflict of interest statement

No conflict of interest was reported by the authors.

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Migration and National Identity in Plzeň: What's Brewing at the Heart of Europe?

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Based on desk research, a site visit and 2 interviews with Ukrainian migrants, this paper examines the significance of migration as a Central European phenomenon, even in and around those practices which are deemed to be millenary European traditions. Pilsner Urquell brewery, in Plzeň, Czechia, serves as an ideal research terrain: a capitalist assemblage that brings together individuals at various levels (owners, management, specialised workers, manual labourers) with different identity documentations, statuses and origins, while preparing the traditional Czech beverage. The diversity in status and nationality is linked to the production process as well as to consumption – such as extensive beer tourism as well as alcoholism. In this way, the paper helps to establish the migrant as a constitutive and not an unsavoury derivate persona in contemporary Western society. Behind every glass of beer, there is a shifting vortex of human relations; the actors involved are likely to have different nationality, residency and citizenship statuses, different documents and therefore different rights.

Keywords: Pilsner Urquell brewery, Plzeň, Czechia, national identity, migrant workers, beer

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Introduction

The word 'migrant' pits together people whose experiences of migration, both now and in the past, are extremely diverse: slaves and spouses, refugees and retirees, nomads and expats, students and skilled workers, merchants and adventurers, conquerors and job-seekers, rural émigrés and urban escapees… and, soon, (more) climate change/environmental refugees (Miller 2023; Vince 2022). Migration or relocation deals with changes in the place of habitual residence, whether of a permanent or a temporary nature, of a shorter or longer distance and within or across states and administrative borders (Nejašmić 2005). The dynamics of contemporary global migration mean that various societies that traditionally experienced net out-migration have, due to economic shifts of fortune, now become net receivers of migrants (Steiner 2023).

We can identify similar trends in Czechia: although responding to modern demographic and economic shifts, Ravenstein's 'laws of migration', posited in 1885, largely still chime. The primary motivation for migration is economic; the main targets of inward migration are urban and industrial areas; and technological change impacts on the number and skills profile of modern migrants (Ravenstein 1885). The range of opportunities and the conditions of employment offered by high-profile and long-established companies may also affect the number and type of migrants drawn to them, in line with Stouffer's model of intervening opportunities (1940). For those with specific skills demanded by the labour market; for those having the will, time, resources and disposition to undergo training to secure such skills; or for the unskilled, ready to accept difficult and labour-intensive jobs, Czechia, Plzeň and the flagship Pilsner brewery may have become their final destination of choice, rather than a stop on the way to further migration.

Various contemporary negative connotations and antipathies surround the term 'migration'. The regimes of illegalisation (de Genova 2002) that surround the practice of migration may be traced to a still-dominant, normative narrative which sees and represents history as a primarily linear story of continuing progress, whereby vagrant nomads, vagabonds and foragers become civilised settlers and householders (Puygrenier 2024). Hence, according to this ideology, to move and to migrate is evolutionarily antecedent in relation to 'to settle' and to 'put down roots'. Such value-laden discourse also suits states who, by definition, are 'static' rather than 'kinetic' (Sheller 2022) and much prefer to deal with residents who 'stay put' (for tax purposes and voting rights, for example), rather than to deal with migrants who can be deemed to threaten and unsettle the national fabric. The 2020 EU Pact on Asylum and Migration offers the most recent set of new rules managing migration and establishing a common asylum system at EU level which, the EU claims, 'will deliver results while remaining grounded in our European values' (European Commission 2021); however, such results are hard to discern (Kużelewska and Piekutowska 2021). While freedom of movement is lauded as a key benefit of the European Union project, this is a privilege to be afforded only to those with the correct identity documentation. The rhetoric around the 2020 Pact still proposes migrants as a net risk and security threat rather than a net benefit to EU countries, despite the economic need for migrants due to greying populations and below-replacement birth rates in practically all European states (de Bruycker 2022).

This paper argues that the figure of the migrant needs to be torn away from the mostly unsavoury associations it has become straddled with in this age of securitisation (Bello 2023). Instead, it needs to transcend into a constitutive – and not a derivative – figure of Western society (Nail and Settle 2016). Sorely needed is the privileging of the primacy of social motion instead of the state, with the latter's implicit territorial fixity, albeit with the outreach that accompanies governmentality (e.g. Jessen and von Eggers 2020). We seek to test this statement by examining the significance of migration as a central phenomenon even in those practices which are deemed to be millenary European traditions.

We have already observed various instances where so-called traditions, for example in food or artisanal production, are undertaken by migrant workers. This happens for various reasons, including a scarcity of labour

supply, conditions of work deemed not attractive enough to and by the locals and the serendipitous presence of savvy immigrant entrepreneurs (Dabić, Vlačić, Paul, Dana, Sahasranamam and Glinka 2020). Craft industries in Paris were already hiring large numbers of immigrants in the late-19th century (Cross 1983: 166). Almost a quarter of all employers in the creative industries in the UK employed non-British workers in 2018 (Bakhshi and Spilsbury 2019). What was then the world's largest single fish-canning factory in Los Angeles, USA, was set up by Martin Bogdanovich, a Yugoslav migrant from the small island of Biševo – now Croatia (Smith 2012) and it was brewery workers from what was then Bohemia who migrated to the US and helped to set up a thriving beer industry there (Orton 2024), just as migrants from Plzeň helped to set up the first British lager brewery in Wrexham in 1882 (Watts 1975: 140).

Rather than focusing on how immigrant families hold on to and repackage the traditions of their former homelands in their adopted new countries, in this paper we illustrate and review how immigrants can and have become deeply ingrained and implicated in the cultures and practices of their new host country, even in a context of right-wing, anti-immigrant discourse.

In order to test and flesh out this hypothesis, we focus our attention on a quintessential European traditional economic and social activity in the very centre of Europe. In this milieu – and in spite of the iconic centrality of beer as a European phenomenon – we postulate that we would find various migrants who – with their efforts and expertise – contribute to make the operation possible. We also hypothesised that we would come across various *types* of migrant, such that (for example) their gender, nationality, as well as legal and economic status and any required documentation to move, settle and work may differ.

We therefore use the case study of a Pilsner brewery as a tool to deconstruct a typically Czech tradition – brewing beer – in the context of the city of Plzeň (also rendered as Pilsen), which is known worldwide as the 'Capital City of Beer' and gave its name to a popular version of this drink, the third most popular in the world after water and tea.

Our focus

Our focus is a brewery in Plzeň, in Czechia (also known as the Czech Republic) – the leading beer-drinking country in the world with 140 litres consumed yearly *per capita* (World Population Review 2024) and which the Czechs themselves refer to as lying at the 'heart of Europe' or *srdce Evropy* (Hall 2003: 109). The town of Plzeň's very name is synonymous with Pilsner and is where the world's first pale lager (now known as Pilsner Urquell) was produced in 1842. The city of Plzeň has been brewing beer at least since it received a charter from King Václav II in 1290. Pilsner Urquell, the brewery whose trademark was registered in 1898 and which is located in the same city centre, now employs around 2250 people – the second-largest private-sector employer in Plzeň, after Škoda – and is responsible for some 20 000 indirect job opportunities. Moreover, the company owns several other popular Czech breweries and trademarks, such as Velkopopovický Kozel, Birell, Gambrinus, Radegast and Proud. These beers are brewed partially in Pilsen, partially in other cities (Maroušková 2014).

We understand a brewery to be, first, a specific place brought together by particular and shifting relations; referring to a brewery is a simple way of codifying a vast network of processes and relationships which continue to morph and shift through time, not least through the arrivals and departures of human subjects. Second, as an economic unit, a brewery is also a network of specific multi-scalar external and internal relations that holds various elements – human and non-human –meaningfully together, with an organisational purpose to produce, market, sell and distribute beer, while making a profit. Third, it is the convergence of 4 material elements – malt, hops, yeast and water – which go into the production of every Pilsner. Fourth and lastly, we also require that the personae who bring this operation into fruition are considered as third persons for the

purposes of their engagement with the operation. Such a description of a brewery is inspired by and approximates the notion of a (capitalist) *assemblage,* as proposed by Deleuze and Guattari (2008).

The setting

The story behind the creation of Pilsen beer and its development involves the movement and mobilities of both products and people; it serves to show how beer and its culture has relied and thrived on innovations, labour and investments from abroad.

In 1838, the citizens and innkeepers of Plzeň could not take it any more: the dark, top-fermented beer that had, once again, been served to them by the local breweries, was sour and undrinkable. In protest, they reportedly poured 36 barrels into the gutter. They then decided to build a new state-of-the-art brewery and commissioned master brewer Martin Stelzer to look around Europe for a suitable brewer to develop and brew a lager beer in Plzeň, which had become so successful in Bavaria. He may have been rude (Purinton 2016: 59) but, in Josef Groll, a Lower Bavarian from Vilshofen, Stelzer found a master brewer who had the necessary knowledge. Groll also brought bottom-fermenting yeast and its technique with him to Plzeň – up until then, Bavaria was the only territory where this technique was dominant. He also decided to use a light barley malt, which was developed in England using indirect firing. The unusually soft water of Plzeň, in combination with the Saaz hops which were grown nearby, led to the invention of a new style of beer (Alberts 2020). On 5 October 1842, Groll made his first brew using these ingredients. On 11 November, the new Pilsner beer was served for the first time in transparent drinking glasses – which were just beginning to become popular in Europe and which showcased the unusual golden colour of the new type of beer. The people of Plzeň approved. Today, the light lager, with its stimulating bitterness, has established itself as by far the most popular type of beer in the world. It may be based in and named after a Czech city but it was invented by a Bavarian (Ebbinghaus 2017). Incidentally, the name Pilsner Urquell is German for 'Original Pilsner'.

The German connection is important: over the last 2 centuries, Pilsner beer has become one of the most important vehicles for Czech national identity. At this point, it is appropriate to pause and point out 2 details that are crucial in relation to Germany and beer in the context of forming, establishing and strengthening Czech national identity. First of all, it should be noted that beer plays a special role in this process of identity formation, which is deeply rooted in the history and traditions of the country. The Czech Republic is known for its positive attitude towards beer; this stance has its origins in a long brewing tradition. Thus, beer is not just a beverage (ČSPAS 2021); in Czech national mythology, beer, its production and the ways in which it is ritually consumed have become one of the sources of national identity (Wilson 2005). Furthermore, if we accept arguments, such as those by Anderson (1991) or Eriksen (1993, 2008), that national identity is always formed in opposition to 'the other' (on the basis of nationality, ethnicity, language, culture, etc.), we can conclude that some of the basic reference points against which Czech national identity has been formed for a long time are German cultural, value and linguistic influences (Holý 2001; Šubrt and Vinopal 2013).

Pilsner beer's unique colour and flavour spread globally. The Czech people became known and represented throughout the world as beer connoisseurs, innovators and experts, not least by Pilsner Urquell's own marketing efforts. However, without the German influence on Czech beer, developed over many centuries of exchanges across a lengthy borderland, the true Pilsners of today may not have existed and not in their present form. Indeed, many decades of interaction with German speakers and German brewing traditions have been conveniently forgotten and fallen victim to populist and nationalist discourse and sentiment. This is an erasure perpetuated by modern Czech brewers and academia and the rich culture along the borderlands between German and Czech speakers has been rendered invisible (Deur 2023). This erasure is compounded by a state-driven narrative that looks disparagingly and suspiciously at immigrants, who are attributed with a 'dangerous

otherness', in spite of these being essential for the economic survival of the Czech economy, as Burzová (2019: 151) posits:

> *In both official and popular urban discourses, migrant workers in Czechia have been represented as outcasts, criminals, brutes, sexual offenders, alcohol and drug abusers, 'parasites' transmitting dangerous diseases – such as tuberculosis and hepatitis – and polluting urban public spaces. Bulgarian-, Romanian-, Russian- or Ukrainian-speaking people are often perceived as embodying such stereotypical images.*

In this context, a study on alcohol consumption by Ukrainian migrants in the Czech Republic concludes that these do not statistically significantly exceed the average alcohol consumption rate of Czech citizens (Urban 2015). From this perspective, it can be concluded that alcohol consumption is often instrumentalised by the media and the political regime as a tool for constructing moral panics (cf. Cohen 1972). Many local politicians – not limited to the right or far right, since the Social Democrats in the city are included – have built their political careers on various statements that denigrate and disparage the migrant workers who sustain their economy. This can be illustrated by the statement of one of the political actors participating in the annual Liberation Festival in Plzeň, a commemoration of the 1945 liberation of the city by US and Belgian troops during the Second World War. He stated that 'the wave of foreign culture flooding into Europe' devalues the legacy of the people who died in the Second World War in the fight for freedom. Here is one form of repetitive political celebration that serves, among other things, to create and reinforce specific political and social narratives (Krčál and Naxera 2019).

Apart from such slurs, various migrant workers in Plzeň face problems related to their economic exploitation, the predatory tactics of job agencies, the lack of career opportunities and the antagonism of local inhabitants. The migrants' resort to alcohol consumption – and especially of cheap, local beer – is attributed as a response to this deep frustration:

> *While the migrant workers significantly contribute to the current unprecedented economic boom in the Czech Republic, their contribution is not acknowledged. In contrast, they face ignorance or even condescension from the inhabitants of the country. Drinking helps to make sense of one's life via relations with others who share the same destiny* (Sosna and Brunclíková 2019: 246–247).

The irony is not missed: the generous resort to the same drink is seen as synonymous with Czech identity amongst local patrons but is attributed to be an expression of frustration and depression resulting from migrant workers being unable to integrate into the same Czech society.

The Pilsner Urquell brewery, rather remarkably, makes just 1 beer – and it remains today in the same location where it was founded, 170-odd years ago. It is also now the only place in the world where its beer is crafted. It is very hard to beat this product's uniqueness, its place attachment and the strict alignment of product to place (Alworth 2020). The brewery itself is, however, no longer locally owned. As from 1999, the brewery belonged to the same owner as MillerCoors: SABMiller, the South African brewers. In 2017, it was bought by Asahi Group Holdings of Japan, the world's 12th largest brewer, which is now the controlling entity (Financier Worldwide Magazine 2017). Pilsner Urquell and 4 other European beer brands – Poland's Tyskie and Lech, Hungary's Dreher and Romania's Ursus – were sold to Asahi so that AB InBev – a Belgian multinational and the largest beer company in the world – could clear monopoly hurdles in acquiring SABMiller, then the world's second-largest beer company. At the time of writing, a South African, a Japanese and a British national sit on Pilsner Urquell's Board of Directors.

Brewery as an inaccessible research terrain

Insights into the more cosmopolitan, current nature of the organisation are not readily self-evident. Attempts to secure appointments with senior management representatives of the brewery in order to find out directly and officially what the background, proportion and distribution of migrant workers was in the brewery itself and in its supply and distribution chains, were twice unsuccessful. Reminders and prompts via email and phone contact were met with no response. We reached out to another Pilsner Urquell representative; however, we were told that, due to a series of internal surveys, unfortunately they could not accommodate us as this would place an unnecessary burden on the staff and reduce their willingness to participate in internal surveys.

Parallel to this, the co-owner of the smaller craft brewery Raven (one of several craft breweries located in Plzeň) was contacted. He describes himself as an economic migrant who started brewing beer in Australia but then came to Czechia, settled in Plzeň and continues brewing beer there. In contrast to the large Pilsner Urquell brewery, he talks about the need to consider the various beer styles that have emerged in different parts of the world. What can be described broadly as beer multiculturalism influences the overall philosophy of Raven, as it tries to innovate and come up with beer products that have never been brewed in the Czech context. Thus, next to a brewery that is based on the fact that it produces the world-famous Pilsner Urquell beer, a small craft brewery trying to 'refresh' the beer market in Czechia can also open and operate by, for example, producing the first Czech sour beer Pilsener Weise (Raven 2024).

Thus, we find in Plzeň a landscape that helps us to seriously critique beer production and consumption as a cornerstone of Czech national identity. In the capital city of beer, 2 breweries have been identified. One, Pilsner Urquell, is considered to be a reification of traditional Czech beer. This brewery's technologies have come from Bohemian/German expertise; it currently belongs to a Japanese corporation and the production and other activities that enable its beer to be brewed and distributed are undertaken by members of many nationalities and ethnicities, some of whom are migrants. The second brewery is also commercially successful and through which a new Czech tradition is being developed by an economic migrant from Sydney, Australia.

Our original plan to juxtapose a large and a small brewery in the context of the transformation of one of the foundations of Czech national identity due to foreign influences had to be laid aside, given the institutional unwillingness of both breweries to collaborate. If we follow Laura Nader's (1972: 292–293) argument that we should follow the 'bottom up' and 'top down' paths in field research inside institutions, the 'top down' path remained unavailable in our case. However, the 'bottom up' route, oriented towards non-managerial staff, was somewhat within reach; we were able to make contact with a couple of migrant employees who agreed to answer a series of questions.

In order to at least partially access the terrain, during a joint meeting we did take the Original Beer Experience tour (see below) at Pilsner Urquell in November 2023, during which we came across a few non-Czech employees. However, no interviews as such were undertaken; and it would not have been ethical to do so impulsively anyway. This also means that any insights into various *types* of migrant, including their gender, nationality and legal and economic status, were simply not available.

Some insights were indirectly forthcoming from some creative internet searches. For example, jobs advertised for 'Pilsner Urquell: The Original Beer Experience' – a tour which 'tells the brand story using the latest technology to entertain, educate and inspire people through all their senses' – does identify additional languages (apart from Czech and English) as an 'advantage' (Pilsner Experience 2024).

Pilsner Urquell as a 'mirror of Czech values'

On the one hand, we are thus left with the institution of the brewery closed to field research. On the other hand, however, we can still turn the optics around and reflect briefly on whether the Pilsner Urquell brewery can be seen as a mirror reflecting Czech values and attitudes. As mentioned above, beer (and its brewing, distribution and consumption) is one of the sources of Czech national identity. If this is the case, this tradition (or its carrier) must be responsive and have the ability to adapt and react to the social value system (Hobsbawm and Ranger 2012). This reflective capacity of brewing, as a Czech tradition and one of the sources of Czech identity, can be illustrated by the Pilsner Urquell brewery's response to the 2022 Russian invasion of Ukraine. Immediately after the start of the Russian aggression and the ensuing refugee movement into Czechia, the brewery declared that it was ready to provide jobs for some of the refugees fleeing the war. The brewery took on similar actor-like attributes when it stopped exporting Pilsner Urquell beer to Russia almost immediately after the 2022 Russian aggression began. The brewery also affirmed its condemnation of Russia's aggression against Ukraine by cancelling its official partnership with the Czech Olympic Committee (as a sub-component of the International Olympic Committee) when the IOC approved Russia's participation in the 2024 Olympic Games. Such positions and actions on the part of Pilsner Urquell reinforce the role of beer in Czech identity, since they are compatible with the opinions and positions adopted by a majority in Czech society – and most of the political spectrum – towards Russian aggression.

Foreign hands in Czechia

The official number of foreign employees in Czechia reached 823,900 in December 2023 – a third of whom were from Ukraine – with Slovaks following closely. This amounts to almost one fifth of the labour force. Like most European countries, Czechia's native-born population is ageing, the number of senior citizens is rising and those of working age are decreasing, leading to a keen demand for foreign labour (ČTK 2024). Additionally, there was a growing number of situations where Czech nationals, supported by a generous social-welfare system, were less eager to apply for or assume physically demanding jobs, possibly accompanied by minimum wages (Matušková and Rousová 2012). Meanwhile, the city of Plzeň (population: 185,000), Czechia's fourth city by population (after Prague, Brno and Ostrava) has become, thanks to its location and industrial infrastructure, one of the Czech localities the most attractive to foreign investors dealing mainly with export-oriented production, including beer. Plzeň has experienced a high influx of foreign workers, mainly from Eastern Europe and Asia, who filled the offered job positions. The largest source countries for such foreign workers have been Ukraine (especially since 2022), Slovakia, Moldova, Cuba, Mongolia and Vietnam – and, more recently, India, the Philippines and Nepal. There have been Vietnamese and Cuban workers, both male and female, engaged with Pilsner Urquell since the 1960s and 1970s (Bortlová-Vondráková and Szente-Varga 2021: 303). Labour-shortage issues are not new to the town and the factory. This latter itself could therefore be posited as a 'core' in the 'core–periphery' model for understanding migration, meaning that 'migrants are drawn from areas that are peripheral in terms of resources, development, services or opportunities and attracted towards central or core areas which have these' (Redmond 2018: 39). This often involves a 'push' from rural areas in the country or beyond which are lacking in economic opportunities and a 'pull' towards more urban and industrial areas such as Plzeň.

In the broader context of Czechia, there are 2 recent, significant migrations, often framed in media and political discourse by the securitisation narrative as a crisis and correlating with both Hirschman's 'loyalty-voice-exit' polarity hypothesis, framing how individuals react to personal circumstances (Hirschman 1970) and with Akenson's definition of forced migration (Akenson 1996). A movement of migrants from the Middle East and

North Africa, peaking in 2015, was instrumentalised by political actors, despite the fact that Czechia was then primarily a transit country. In contrast, the second and more recent influx of refugees from Ukraine caused by the 2022 Russian invasion had a significant impact on the socio-political and demographic reality of Czechia. Data used by the Ministry of the Interior suggest that there are around 300,000–400,000 Ukrainian refugees in Czechia (MVČR 2024). Since the country has a native-born population of just over 10.5 million people, we can state that, in *per capita* terms, it is one of the countries that has received the most refugees. Plzeň and its region have gradually absorbed around 10 per cent of the total number of Ukrainian refugees. The above-characterised time intervals associated with the increased number of immigrants heading to Czechia significantly influenced the socio-political discourse and led to a clear dichotomisation between deserving and undeserving immigrants. In the context of the expansion of the foreign labour force in Czechia, the narrative concerning (*de facto* minimal) migrants from Islamic states has persevered in a much livelier spirit; these persons have been securitised, demonised and even dehumanised (cf. Naxera and Krčál 2018). In contrast, more than 50 per cent of adult Czechs support accepting and helping Ukrainian refugees – down from 70 per cent at the start of the invasion in 2022 but still significant (STEM 2024).

Let us revisit the issue of brewing beer in Plzeň and the influence of migrants in this task. The city burghers were especially insistent that the chosen craftsman, the Bavarian Josef Groll, would brew in such a way that he 'would not have to entrust his barley and malt to foreign hands'. These instructions come from their 1839 formal, written request, a document which is still preserved (beerculture.org 2024). Yet, 'foreign hands' are all over Pilsner Urquell. Such foreign hands come in many guises: founding expertise and technologies, management, specialised workers, manual labourers and current owners and directors.

A general antipathy towards immigrants is prevalent in Czechia and Plzeň (e.g. Drbohlav and Janurová 2019): local politicians have constructed the dominant cognitive frameworks on migrants and refugees, aligning these groups to radical Islam and threats to Czech national security (Strapáčová and Hloušek 2018). This stance obliges large companies there (like Pilsner Urquell) to not disclose any information about the migrant component of their labour force – lest, for example, it erodes their domestic market share and the (huge nationalist-related) power of their brand. Why potentially alienate Czech nationalist beer-drinkers and gift their custom to competitors? Such an explanation would explain their strategic reticence towards granting us an interview or providing us with workforce data.

Interviews with migrant workers

Through our contacts among locally based NGOs, we reached 2 migrants – 1 female, 1 male – who worked at the Plzeň brewery. In individual interviews, we asked these respondents several questions about their work at the brewery – mainly how they came to work there and how the brewery management treats migrants. These interviews are merely indicative but they still provide several insights into the internal structures of the brewery as one of the two largest employers in the city of Plzeň.

Due to the closed nature of the brewery as a research field and the impossibility of using the snowballing effect, we were restricted to these 2 interviews. The data obtained are supported by the experience of the Czech co-authors of this paper who have been working with refugees from Ukraine over the long term. The narrative structure is therefore suitably generalisable and transferable to the general level. The main aim of the interviews was to obtain data that would allow us to highlight and reinforce the arguments we have presented above. As such, our approach is not based on the assumptions of ethnographic research nor, due to the impossibility of penetrating the research terrain described above, do we aspire to such a goal. Rather, we seek to ground the argument we present in the real experience of Ukrainian immigrants which, as we argue above, is generalisable in combination with our knowledge of the setting. This generalisability of the data can be further supported by

the fact that experiences in the employee–employer and immigrant–employer approach should be shared. This is particularly evident in the dichotomisation between long-term foreign workers and the different treatment of war refugees (who are forced to work through an employment agency).

Initially, the respondents did not want to talk to us at all. Despite the promise of clear anonymisation, they were afraid of potential sanctions from the employer/state apparatus. This is perhaps a key reason why we have not been able to widen the network of respondents. However, both respondents confirmed that a large number of migrants work in the brewery in various positions, most of them manual labourers. To increase the likelihood of penetrating the field, we used a fieldworker who is in contact with us and who is, herself, a war refugee who assists other refugees in her fieldwork. This allowed us to at least partially overcome barriers and recruit 2 respondents. The interviews took place during the spring of 2024 and were based on the principles of structured interviews, with the basic format and content drawn up by members of the research team.

First, both interviewees pointed out and confirmed that the brewery employs many foreigners.

> *R1: It seems that everybody works here. Vietnamese, Slovaks, Hungarians. There are a lot of Ukrainians.*
> *R2: There are a lot of Ukrainians and then there are Moldovans, Romanians and Hungarians.*

Given that the brewery does not provide any information on the proportion of migrants (or foreigners in general) whom it employs, this finding is very helpful for the purposes of our research. As already mentioned, after the 2022 Russian invasion of Ukraine, the brewery offered employment to a large number of Ukrainian refugees, which is consistent with why a large proportion of employees are Ukrainian migrants. The Ukrainian diaspora currently has the most significant representation in Czechia. In the Plzeň region, they make up two-thirds of all migrants (63.9 per cent), followed by Slovaks, Vietnamese, Bulgarians and Romanians (ČSÚ 2022).

Second, although the brewery has offered many jobs to refugees, it only employs them indirectly. Both our respondents are Ukrainians: one is a refugee who came to Plzeň after the start of the 2022 Russian invasion of Ukraine, while the other has lived in Plzeň for several years. They both work at the brewery through an agency. According to the interviewees, the brewery management does not employ migrants or refugees directly until and unless they reach a certain level of Czech language proficiency (specifically C1).

> *R1: Almost all of them work through an agency. Only those who have been here for a long time work directly.*
> *R2: I asked several times if I could work directly. I was always told that I didn't have enough knowledge of the Czech language.*

It is unclear whether language proficiency or length and type of stay in the country is relevant to the brewery. It is possible that employing migrants who are not permanent residents is risky for the company because they are not sure how long the migrants plan or are able to stay in Czechia. Instead, working with an agency offers the employer an easier way to get a steady labour supply. Czechia provides several types of residence permit that allow migrants to work. The most common type of residence for employment purposes is the employee card, which allows third-country nationals to legally stay and work in Czechia for more than 3 months (Ministry of Foreign Affairs, Czechia 2025). The validity period of the employment card can be a maximum of 2 years and is usually based on the duration of the employment relationship. The cardholder must report changes in employers or job positions to the Ministry of the Interior and, if the job is lost by the cardholder, he or she must report for a new job within 60 days or the employment card will expire (FRS 2022). Free access to the labour market also allows for a long-term residence permit for family cohabitation. The validity of this type of residence is linked to the document's validity of the family member with whom the

applicant wishes to live in Czechia but only up to 2 years. Various other types of residence allow migrants to work, subject to certain conditions. There is also a permanent residence permit; this provides foreigners with the greatest range of rights. A foreigner can apply for this only after fulfilling the condition of continuous residence in the territory for 5 years. The validity of the residence permit is not limited in time and only the validity of the physical card is extended after 10 years (MVČR 2021). Thus, it is clear that, if a foreigner possesses a permanent residence permit, his or her role as an employee will also be demonstrably stronger. The application for permanent residence also includes an examination of Czech language skills. However, this is only at the A2 level, which does not meet the brewery's requirements.

> *R2: I understand that, if you have permanent residency, they will take you anywhere. It seems to me that refugees are treated with distrust.*

Finally, we asked about the respondents' overall connection to their employment at the brewery and whether they had experienced any form of discrimination from management.

> *R1: They don't pay badly. The work is hard. I load barrels into trucks all day. We get a nice bonus once a quarter. The management treats us normally. I wouldn't say there's a great team here but it's manageable. We get a lot of temps, so there's a lot of turnover.*
> *R2: The work is not easy and not really for women, but it pays well. The Czechs who work in the brewery don't like us much and the Ukrainians who have lived here for a long time hate us even more. But there is no discrimination from the brewery, although it is strange that I cannot work directly.*

In other words, both respondents were particularly satisfied with the financial compensation for their work, although they described it as difficult. They agreed that they did not experience discrimination from the brewery and referred such practices to specific individuals rather than to the management or to the brewery as a whole.

Conclusion

Based on the example of the Pilsner Urquell brewery in Plzeň, Czechia, the migrant is, indeed, a central political figure of our time as well as a key economic actor, following centuries of tradition in global migration patterns. Immigrants have become deeply ingrained in the culture and practices of both town and country. We were unable to get the brewery to co-operate directly with us and we can understand the reasons for this. In any case – and thanks to contacts with local non-governmental organisations – we successfully conducted 2 interviews with migrants working in the brewery and learned about the importance of identity documentation in Pilsen, especially employee cards and residence permits.

If we place the relationship between migration, Plzeň and beer-brewing (as something that forms one of the central tenets of Czech identity) on a more general level, we can point to the fact that, according to the statistical modelling of socio-demographic data, the Plzeň region is expected to absorb over 111,000 migrants in the future. Migration is the main factor of population growth in the region (ČSÚ 2020). In the context of Central European countries, Czechia ranks among the countries with the largest positive balance of refugee and migrant inflows *per capita* (Migrationonline.cz 2024). Czechia has thus become what Ravenstein (1885) called a country of 'absorption', as the demographic boost in its population now comes from inward migration rather than natural increase. Ravenstein's theories to explain and categorise the great global movement of people in the late-19th century can still be used to explain the contemporary manifestation of this millenary phenomenon.

It remains to be seen whether his supposition that people often migrate in a 'step-by-step' fashion will apply to Czechia in the future: will it be the final destination for migrants or just a step on their way to Western Europe?

Beer is a constant in many respects. It has been a regular tradition for most of European history, going back centuries. It is a product 'at the heart of Europe' and branded as part of the national identities of various European countries, including Czechia (Hall 2005). If any culture in the world qualifies as a beer-drinking culture, it is the Czechs (Hall 2003: 119).

The recipes of proven and established beer brews have not changed over time. The 4 basic ingredients in its formula are stubbornly immutable. Yet, behind every glass of beer, there is a shifting vortex of relations that brings together investors, entrepreneurs, master brewers, managers, workers and distributors. In the context of the 21st century, these are also likely to have different nationality, residency and citizenship statuses, different documents and therefore different rights. That a prime symbol of Czech national culture (Pils lager beer) – which is place-branded and locally embedded (in Pilsen, its only base of production) and depends incontrovertibly on the input of non-Czech skills, technologies, workers and investors – may appear as a contradiction in principle and nationalist ideology but it is certainly not so in practice. This has been the idea behind this paper: beer can and does 'explain the world' (Swinnen and Briski 2017).

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Addressing Gender-Specific Needs: The Governance of Integration of Refugee Women in Warsaw

Małgorzata Odolczyk*

The nexus between immigrant integration and gender has primarily been studied in the context of Western European countries with a long tradition of migration. However, there is a clear gap in research on the integration of immigrant women in the context of CEE. Using discourse around and the implementation of immigrant integration policies as they include/exclude gender-sensitive content in the capital city of Poland, this article shifts the perspective to the localised CEE context and bridges the theoretical and empirical gaps. The study developed in two stages. The first stage included policy analysis of 9 governmental documents or directives related to immigrant integration; the second included fieldwork consisting of 12 in-depth interviews with representatives of NGOs, employees of local administration and migration scholars, conducted between May and August 2024. All interviews were transcribed and thematically analysed. The results indicate that the gender-specific needs of refugee women are mainly addressed through NGO-run programmes, as opposed to public administration programmes, which favour a mainstreaming approach. Unlike in the Western European discourse, gender is used to distinguish deserving from non-deserving refugees, although not as a part of a national identity.

Keywords: gender, integration, governance, refugees in Poland

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Introduction

Growing academic attention has been paid to the intersection of gender and migration governance (Benería, Diana Deere and Kabeer 2012; Cleton and Meier 2023; Foley 2023; Mahon 2021). The existing literature demonstrates how gender is used, firstly, to create divisions between the native-born majority – 'us' – and the foreign-born minority – 'them' – in Europe (Farris 2017; Kofman, Saharso and Vacchelli 2015); secondly, to legitimise border restrictions in order to supposedly protect Western societies from non-Western migrant women, pictured as 'backward victims of patriarchy' (Andrijasevic 2009; Farris 2017; Kofman *et al.* 2015; Olwig 2011); and, thirdly, to present patriarchal relations as exclusively related to 'immigrant culture' (Farris 2017; Rajas 2012). This binary opposition of the egalitarian, liberal, civilised European self and the patriarchal, uncivilised 'Other' reinforces immigrant exclusion and instigates a threat to the achievements of liberal democracies (Farris 2017). Most of the literature, however, uses data from old immigration destination countries of Western Europe (Farris 2017; Hadj-Abdou 2019; Kofman *et al.* 2015; Masoud, Holm and Brunila 2021; Olivius 2014; Olwig 2011; Rajas 2012). The Central and Eastern European (CEE) context is absent in this academic debate, yet it is uniquely different to the Western European one. Unlike in Finland (Rajas 2012) or France, Italy and the Netherlands (Farris 2017), in CEE such politics of gender equality and the conviction that they are part of the national identity were never developed (Perini 2019).

As gender and immigrant integration become important aspects of governing, analyses of gendered rationalities in integration policymaking are necessary in order to explore and better understand the processes that follow them. This study focuses on the governance of the integration of refugee[1] women[2] using the case of Warsaw. It maps out and critically assesses how the gender-related needs of forced migrant women are addressed in the governance of immigrant integration. The paper then demonstrates how gender-specific needs are present or absent in public administration and NGO-run programmes, the reasons why and the results. It examines the governance processes through an analysis of policy documents, as well as interviews with integration governance stakeholders, including non-governmental organisation (NGO) representatives, employees of local administration and migration scholars. This approach allows me to explore this previously under-researched area and build a coherent overview of the state of affairs.

The study refers to the governance of integration, understood as the regulation and management of migration by various public (administration) and private (e.g. NGO) actors at different policy levels (Geddes 2022). Furthermore, the analysis refers to gender-specific needs, understood as needs resulting from socially constructed male and female roles which are uniquely different in the migration context (Hajdukowski-Ahmed, Moussa and Khanlou 2009). Women are disproportionately more vulnerable to various forms of violence in situations of mobility. They also often take on additional care-related roles within the family or community (Hajdukowski-Ahmed *et al.* 2009). As Goździak (2009: 187) explains, 'Gender is a core organising principle of social relations and opportunities'.

This study is largely exploratory, yet not exhaustive of the gender and migration-governance nexus in the overlooked context of CEE. To reduce the risk of falling into methodological nationalism (Glick Schiller and Wimmer 2002), the study will use a localised perspective. It will focus on the case of Warsaw, the capital and largest city in Poland which, in recent decades, has hosted the largest foreign-born population in the country. In light of recent crises including the humanitarian crisis at the Polish-Belarussian border, as well as the full-scale invasion by Russia in Ukraine, it is increasingly becoming a destination for migrants from various countries across the world (Winiarska *et al.* forthcoming). A case study of Warsaw can therefore provide a unique overview of the governance of refugee women's integration in the CEE setting.

The article argues that, firstly, gender is a part of public discourses about migration and integration, although not in the same way as it has been described in the Western-based literature. Gender is not seen as

one of the values threatened by the influx of migrants, because gender equality is hardly ever considered to be a part of the national identity 'in danger'. If present in the discourse, gender refers to distinguishing 'deserving' migrants (White, Christian women and children) from 'non-deserving' (Black and Brown Muslim men). Secondly, although the gender-specific needs of women are widely incorporated into programmes implemented by NGOs or in cooperation with local administration, this is mainly done at a local level. NGOs are more likely to provide programmes targeted at women, as opposed to public administration which favours the mainstreaming approach. Finally, as in the results of other studies (e.g. Farris 2017; Kofman *et al.* 2015), in the case of Poland, migrant men are often presented as undeserving of assistance and a threat to Polish women.

The article begins with some background information, including the theoretical convictions, the literature on integration and migration governance and the intersection of immigrant integration governance and gender policy-making, as well as the discourse on gender and migration in the CEE setting. Furthermore, the historical context and migration overview in Poland and, more specifically, Warsaw, is introduced. Secondly, this article presents the findings of the study regarding gender in discourses surrounding migration and integration, the presence of gender-sensitive policies in public administration and NGO-run programmes, the reasons for this presence or absence, as well as the results. Finally, the findings are discussed in the context of the existing literature.

Theoretical background

Integration and migration governance

Analyses of policies targeting and facilitating the process of immigrant integration have typically been conducted within a field of immigrant integration, rather than migration governance. In either approach, immigrant integration itself is defined as a two-way process of mutual accommodation between newcomers and the host society (Garibay and de Cuyper 2018). Public and private actors on both a national and a local level implement 'integration policies' to facilitate the process. These policies include, among others, actions facilitating labour and housing-market access, host-country language courses, social work and civic integration courses. However, the literature does not present a unanimous agreement on what constitutes successful integration (Castles, Korac, Vasta and Vertovec 2002; Phillimore 2020).

Over the years, the concept of immigrant integration has been contested for being too simplistic and for being understood primarily through the lens of the individual obligation of migrants (Hadj-Abdou 2019; Schinkel 2018, 2019; Spencer 2022). Consequently, the responsibility for one's integration – or lack thereof – was typically placed on the migrants. Unlike Schinkel, who calls for abandoning immigrant integration as a field altogether, Hadj-Abdou advocates for strengthening critical approaches through the analysis of immigrant integration as a governance technique, rendering ethno-cultural differences purposeful for certain ends of immigrant integration projects (Hadj-Abdou 2019). Similarly, Philimore (2020) proposes to focus on the role of the receiving societies and actors in supporting and providing the context for integration, highlighting the need to widen the scope of focus of integration on the role of state and non-state actors and outlining a multi-dimensional integration model.

Integration policies in the local context have been the focus of a growing field of studies. Local policies are often viewed as better fitted to local needs, more efficient and participatory (Filomeno 2017; Glorius and Doomernik 2020; Hillmann and Samers 2023; Street and Schönwälder 2021). A handful of studies highlight the challenges of local policy-making – such as under- and unstable funding, the coordination of multiple actors engaged in integration policy-making, the unequal quality of local services and, consequently, unequal opportunities created for migrants (for an exception see: Łukasiewicz, Cichocka and Matuszczyk 2024; Łukasiewicz, Oren and Tripathi 2021). In this local context, the notion of migration and integration governance

refers to the regulation and management of migration by various actors at local levels. It is not only an after-the-fact reaction to migration patterns but, more importantly, a way of shaping them (Geddes 2022). The concept of migration governance helps us to understand international migrations and how they are shaped through processes of inclusion and exclusion by public and private organisations. Migration governance assumes the taking of actions at different levels but also the avoidance of certain of them (Geddes 2022: 312) – for example, by including or excluding some actions from policy documents (Penninx and Garcés-Mascareñas 2016: 20).

A growing field of studies on integration literature, at a national or a local level, analyses 'immigrant mainstreaming' (e.g. Scholten and van Breugel 2018; Westerveen and Adam 2019), understood as a strategy aimed at accommodating the needs of specific immigrant groups. Scholars, moreover, highlight the need for a 'twin-track strategy' and supplement mainstreaming with targeted policies (Westerveen and Adam 2019).

In the field of migrant integration in the context of CEE, the situation of various marginalised groups, including women, remains overlooked. The following section focuses on the nexus between gender and immigrant integration.

The intersection of immigrant integration governance and gender policy-making

Gender mainstreaming, a strategy for responding to inequalities between women and men, has been adopted by national and international institutions worldwide as a means of including gender in the central, 'mainstream' institutional activities, rather than of specialised, marginalised bodies only (Caglar 2013; Charlesworth 2005). It underpins the need to entail gender throughout the entire governing process, including immigrant integration governance (Westerveen and Adam 2019). Yet, studies show that the reliance on gender mainstreaming enhanced the risk of 'diluting gender expertise' (Lombardo, Meier and Verloo 2017: 7), increased the lack of binding commitments, as well as the monitoring of activities by a specialised, responsible body (Verloo 2005), or the lack of critical conceptualisations of policy problems (Mazey 2000).

A growing field of studies examines the role and relevance of gender in immigrant integration policy-making (Farris 2017; Hajdukowski-Ahmed *et al.* 2009; Kofman *et al.* 2015; Masoud *et al.* 2021; Olivius 2014; Rajas 2012; Westerveen and Adam 2019). Existing studies use cases mainly from Western Europe, where gender categories construct the divisions between 'us' and 'them' and shape national and political communities (Kofman *et al.* 2015). Gender equality and sexuality are therefore at the centre of recent debates around cultural differences between majority and minority populations (*ibidem*). In this context, anti-immigrant policies in Europe, including the strengthening of border control, are legitimised in public discourse by using representations of non-Western migrant women as 'backward victims of patriarchy' and are problematised as the 'Other' in need of protection (Andrijasevic 2009; Kofman *et al.* 2015; Olwig 2011). Rajas' (2012) analysis examined gender equality in Finnish immigrant integration policies. It revealed how immigrant women were racialised and essentialised by linking gender equality and women's capacity to be a worker and a citizen in the same way as men. Farris connects such an individualised understanding of gender equality with a retrenching of welfare support and privatisation of care services in Italy, the Netherlands and France (Farris 2017). Women from non-Western countries were deliberately 'pushed' into the care and social-reproduction sector through civic-integration programmes (Farris 2017: 16).

Discourse on gender and migration in the CEE context

According to Slany, Małek and Ślusarczyk (2010), early migration studies in Poland largely lacked empirical research and statistical data incorporating the gender variable. As migratory patterns in Poland changed, early studies of integration programmes, although without the focus on the gender perspective, pointed to specific

difficulties that refugee women were facing, including those related to childcare, religious factors or culturally imposed assignments (Pawlak and Ryabinska 2007). Similarly, Kość-Ryżko (2021) described refugee women's experiences and difficulties as significantly different to those of refugee men, mainly in the areas of labour and housing access and building new relationships, as well as due to responsibilities related to childcare and maternity. Yet, research shows that the topic of gender-related needs has been absent in the legislation related to migration (Krzystek and Małek 2008).

Women's rights in Poland are increasingly being limited and gender equality is undermined by conservative campaigners (Bucholc and Gospodarczyk 2024). In this context, an analysis of the relevance of women's rights in terms of the discourses and policies surrounding the topic of immigrant integration in Poland might be a valuable contribution to this field of research. The CEE context is different to that of Western Europe in terms of how the gender and immigrant-integration nexus plays out, due to its unique history, including a lack of overseas colonies,[3] distinct politics of gender equality and the strong influence of the patriarchal Catholic culture (Perini 2019).

Existing studies refer to Islamophobic and anti-immigrant discourses in Polish feminist scholarship and public debate, which have some similarities to those in Western European countries (Bobako 2017). In Poland, one of the key forces blocking women's rights has historically been the Catholic Church and, therefore, the fight for women's rights means contesting religious institutions. The secularism of Western Europe becomes the equivalent of 'European liberal values' which need to be protected from anti-modern religion. These claims reflect Farris' (2017) analysis of the Islamophobia of liberal feminists. Yet, the role of integration policies which, for Farris, is one of the key components of the 'femonationalist' project, remains under-explored in Polish literature. Existing studies point to the representations of 'positive refugeeness' as feminised and depoliticised refugee imagery (Szczepanikova 2010). Women with children are associated with powerlessness and neediness and considered 'deserving' of aid, in stark contrast to migrant men, who are portrayed as a threat and are thus less likely to induce trust and compassion (Klaus and Szulecka 2023; Szczepanikova 2010). Overall, the nation-states' control mechanisms are used to establish divisions between those who are 'desirable' or 'worthy of protection' and those who are 'undesirable' and 'unworthy' (Bloch 2023). A migrant woman fits the former categories much better than a man, due to the nationalist imagery of femininity seen as vulnerability and submissiveness.

Study background: migration and integration in Poland and Warsaw

Following the collapse of communism in Poland, the country has been shifting from low migration and relative ethnic homogeneity to increased immigration and growing diversity (Górny and Kaczmarczyk 2019; Okólski 2012). Since the second half of the 2010s the migration balance has been positive and the country is evolving into having a net-receiving status (Fihel, Janicka and Okólski 2023). Between 2008 and 2021, asylum applications in Poland varied between 4,070 and 15,240 (Sobczak-Szelc *et al*. 2022: 31). In the last 20 years, the largest group of forced migrants in Poland consisted of Russian citizens (primarily Chechens), with a significant change noted in 2021 when the top 3 nationalities shifted to Belarusians, Afghans and Iraqis (Sobczak-Szelc *et al*. 2022). Furthermore, the situation radically shifted in 2022, with the arrival of 1.53 million people displaced from Ukraine (Łukasiewicz *et al*. forthcoming). For this group, unlike other protection-seekers, a new Temporary Protection law (TP) was put in place, with immediate access to the welfare system and labour market and narrow targeted assistance. The study focuses on Warsaw as the city attracting the highest and most diverse number of foreigners in Poland (Winiarska *et al*. forthcoming). Warsaw's foreign-born population before 2022 was estimated at around 130,000, i.e. 7 per cent of the city's population. After 2022, that number increased by a further 100,000 to reach around 14 per cent (Łukasiewicz *et al*. 2024) (*ibidem*).

Until the 2015 parliamentary elections, won by the conservative Law and Justice party, migration was missing from political and public discourse. However, since 2015, migration has become politicised and the new right-wing government implemented various anti-refugee policies, including restricting access to asylum and defending asylum systems (Carta *et al.* 2022). The anti-refugee discourse and policies escalated further in 2021 with increasing push-backs on the Polish-Belarusian border (Krępa and Judzińska 2023). The violence on the border continued, with 116 deaths documented by the end of March 2024 in the 4 countries experiencing the crisis (Belarus, Latvia, Lithuania and Poland); pushbacks continued in 2024 after the liberal Civic Platform won the election in Poland (Bronitskaya et al. 2024). However, this hostile approach did not apply to all persons seeking asylum in Poland, as evidenced by the welcoming of Ukrainians fleeing the war in 2022 (Klaus and Szulecka 2023; Laurent and Thevenin 2024).

As of 2024, Poland had no strategic migration and integration plan outlining the migration strategy of the country in a coherent manner. The most recent programme, 'Poland's migration policy – current state and postulated actions' [pol. *Polityka migracyjna Polski – stan obecny i postulowane działania*] from 2012 was annulled in 2016 (Łodziński and Szonert 2023). In the spring of 2024, the new government and a new Ministry of the Interior and Administration developed a migration strategy for Poland for 2025–2030 (MSWiA 2024). The lack of an overarching strategy extended to integration policy. Over the years there have been various attempts to produce a single document outlining the strategy for integration, yet not one has been accepted. However, in line with Sobczak-Szelc et al. (2020) I argue that, although Poland's integration policies are fragmented and incohesive across government sectors, they do exist, though they are quite difficult to map out.

The country's integration policy is closely connected with its asylum policies. The only tool defined at the central government level is the Individual Integration Programme (IIP), which is available to forced migrants with refugee status and subsidiary protection. IIPs, although designed and funded by the central administration, are implemented by local governments. In the case of Warsaw, that is the Warsaw Centre for Family Assistance (WCFA). Although forced migrants from Ukraine who arrived in 2022 and received temporary protection (TP) – like recognised refugees – gained immediate access to the Polish mainstream welfare system, they remained excluded from accessing IIPs (Łukasiewicz 2017; Sobczak-Szelc *et al.* 2022). Despite this limitation, TP holders could access many specialised integration activities developed at the local level and implemented by the local administration and non-governmental organisations (Łukasiewicz *et al.*, forthcoming) Although Poland's capital hosted the largest population of forced migrants, immigrant integration has not been at the top of the political agenda of the municipality of Warsaw, and the city did not have a single strategic document addressing the issue (Winiarska *et al.,* forthcoming). Various public and private actors in Warsaw are now engaged in implementing a broad range of integration activities for foreign-born residents, including refugees. The 2022 full-scale Russian aggression in Ukraine was a turning point in the overall governance of migration, with significant funds being allocated at the levels of state and local governments, international non-governmental organisations (INGOs) and non-governmental organisations (NGOs) (*ibidem*).

The city of Warsaw implements gender-specific programmes, such as the Warsaw for Women programme and the Woman's Council, which have measures aimed at including refugee women's voices (UM Warszawa, n.d.). Although these activities fall beyond the scope of this article, it is important to note that, as part of such gender-responsive strategies, the needs of migrant women might also be addressed.

With regards to the lack of research into the nexus between immigrant integration and gender, the categories identified in previous research might require revisiting in the context of Poland. This study builds on these findings and contributes to the literature on the intersection of immigrant integration policies and gender by analysing integration activities and policies in the CEE context. I will use the case of Warsaw to delineate and critically evaluate the presence – or absence – of gender in the discourses and policies of immigrant integration.

Methodology

The research results presented in this article are drawn from a broader study entitled 'Gender and Expert Knowledge. A Study of Migration and Integration Policies in Germany, Poland and Sweden'.

The dataset used for this article includes 9 governmental documents issued between 2012 and the spring of 2024 related to immigrant integration, 6 on the central and 3 on the local level (see Table 1). All documents are available online on government websites. The documents have been uploaded to the qualitative analysis software Dedoose and analysed using thematic analysis.

Table 1. Analysed documents

	Document name	Central/Local level	Time when developed	Implementation status
1	Polish Migration Policy – Diagnosis of the Initial State of Affairs	Central	2020	Adopted
2	Polish Policy on Integration of Foreigners – Principles and Guidelines	Central	2013	Developed, not adopted
3	The Act of 12 March 2004 on Social Assistance	Central	2004 (uniform text in Journal of Laws of 2024 item 1283 with further amendments)	Adopted
4	Polish Migration Policy – the Current State of Play and Further Actions	Central	2012	Adopted in 2012, cancelled in 2016
5	Socio-Economic Priorities of Migration Policy	Central	2018	Adopted
6	Regulation of the Minister of Labour and Social Policy of 7 April 2015 on the Provision of Assistance to Foreigners	Central	2015	Adopted
7	#Warsaw2030 Strategy	Local	2018	Adopted
8	2030 Strategy for Solving Social problems	Local	2021	Adopted
9	The Social Diversity Policy of the Capital City of Warsaw	Local	2022	Adopted

The study also uses primary data – i.e. in-depth interviews – which I conducted 4 between May and August 2024 in Warsaw. Participants were recruited using my professional contacts, as well as those of other Centre of Migration Research team members, through email and phone. In total, 12 interviews were undertaken,

including 5 using the Zoom platform and 7 in-person in the interviewees' offices. The interviews were carried out in Polish and lasted approximately 1 hour. I work as an immigrant service-provider in a Warsaw-based non-governmental organisation, which has facilitated the recruitment of the study participants and the process of data collection. In addition to my professional background, the course of the research process was also facilitated by my positionality as a female Polish citizen. The interviews were collected based on purposive sampling and, subsequently, snowball sampling. The sample included representatives of Warsaw-based NGOs (N=8), employees of local public administration (N=2) and migration scholars (N=2) (see Table 2). Of the study participants, 8 were female and 4 were male. None of them had a background of immigrating to Poland.

Table 2. Sample structure, N=12

	Participant's gender identification		Total
	Male	**Female**	
NGO	2	6	8
Local administration	1	1	2
Academia	1	1	2

The dataset used for the qualitative interviews included transcripts of 12 in-depth interviews, all recorded, transcribed and uploaded to Dedoose for thematic analysis (Guest, MacQueen and Namey 2012).

The methodology used in the study has three main limitations. First, it was only exploratory in nature. Secondly, the study looked at the service-providers without analysing the perspective of the migrant women. Therefore, a further analysis of the subject, which would include looking into the immigrant women's experience of participating in the integration programmes, is recommended. Thirdly, the sample had the following limitations: narrow representation from public administration and, the absence of service-providers with migration background In future, a study involving a wider sample would be needed to gain these valuable insights. The research involving live subjects was approved by the Ethics Committee at the Centre of Migration Research at the University of Warsaw and followed ethical guidelines to minimise the risk of harm and ensure informed consent, the anonymity of participants and confidentiality. The approval certificate number is CMR/EC/V/2024.

Results: the intersection of immigrant integration and gender

This section describes public policies targeting migrants in Warsaw, as laid out in the document analysis and interviews with study participants. For the purpose of this study, the programmes are divided into 3 categories: national-level public policies implemented locally; local-level public policies implemented by public institutions (in some cases in cooperation with local or international NGOs); and local-level public policies implemented by NGOs (see Table 3). The available programmes provide a wide range of activities addressing the various dimensions of integration, including employment, healthcare, housing, childcare and so on.

Table 3. Programmes referenced by study participants

National-level public policies implemented locally	Local-level public policies implemented by public institutions	Local-level public policies implemented by NGOs
Individual Integration Programme, available for holders of refugee status or subsidiary protection	Employment services offered in the local employment offices or at the WCFA; Polish language courses at the WCFA; speaking club Polish Cafe at the WCFA; art therapy at the WCFA in cooperation with INGOs or local NGOs; available to different groups of migrants or forced migrants, depending on the funders' goals	Polish language courses; childcare; psychological support; career counselling; maternal and perinatal support; mental health support; housing support; material aid; medical support; workshops and vocational training; intercultural assistantship; available to different groups of migrants or forced migrants, depending on the funders' goals

Gender in public discourses on migration

According to one interviewed migration scholar, the discourses surrounding migration and gender in Poland often closely resembled those of security. The figure of migrant men, in the participant's view, was often related to a threat to security:

> *The issue of migration is quite abstract. In the sense that migration was somehow used in election campaigns but through the prism of a threat and mainly then it was associated with men, probably Muslim. In any case, the man was the threat (...). All these election discussions were reproducing, (...) pictures of riots in the suburbs or of some kind of aggression on the part of men* (GEN_ACADEMIA_2)[4].

Gender, if mentioned, was also evoked in the context of migrant men posing a threat to Polish women: 'This is one of the most important themes in the campaigns of these radical circles in Poland. It is the creation of a sense of threat and a vision of streets that will be dangerous for Polish women' (GEN_ACADEMIA_1). However migrant women rarely appeared as a subject of discourse other than as people 'deserving aid'. Furthermore, the study participants contrasted gender equality in Poland with that in Western Europe. In their view, it was not part of a national or European identity and, consequently, its acceptance or lack of acceptance did not trigger an 'othering' factor for migrants. One participant, with decades of experience in migrant integration, ended with a conclusion that she wished gender equality was part of discourse and identity: 'Well frankly, I would like us to get to this point in our discourse, that this is our biggest problem [but it is not]' (GEN_NGO_8). According to the respondent, the nature and the focus of discourses around gender and migration in Poland are markedly different from those present in the old immigration destination countries of Western Europe.

Gender in public integration policies in Warsaw and a broader national-level context

Gender in policy documents

An analysis of 9 public policy documents at central and local levels revealed a significant gap in the gender-related governance of immigrant integration. Of the analysed documents at the central level, only 1 referred to the

aspect of gender in immigrant integration. However, this document has never been adopted. The 'Polish Policy on the Integration of Foreigners – Principles and Guidelines' (*Pol.* 'Polska Polityka Integracji Cudzoziemców – Założenia i Wytyczne' 2013) mentioned the relevance of gender in 3 contexts. The document recommends paying special attention to gender in the realisation of the following postulates:

1. Polish language courses, with the recommendation to divide the groups based on the gender of participants:

Professional language education during the procedure – dividing foreigners into groups based on the gender and age of the participants.[5]

2. Perinatal care as a means of improving the psycho-physical health of foreigners and childcare, a measure for improving the situation of foreigners on the labour market:

Women with children in their care should be enabled to participate in activities, through care being provided for their children.

Ensuring access to medical care for women and informing them about medical procedures and care during pregnancy and childbirth.

3. Monitoring and evaluation of sensitive groups as a means of promoting integration:

A systematic survey of the issue and the state's needs regarding the integration of migrants: the needs of migrants arriving in Poland; their willingness to integrate and the degree of their integration into Polish society, including the monitoring of the situation of those individual national (ethnic) religious groups and migrant groups particularly at risk of social exclusion (e.g. women, children, the elderly): barriers to integration, discrimination, racism and xenophobia.

The local-level documents discuss inclusion and diversity in a wider, more holistic way than central-level policies. They focus on the broadly understood social cohesion within the local community of Warsaw, yet without specifically targeting any social groups. Although both immigrant integration and gender are mentioned as areas which might require attention, the nexus between these 2 is missing. Importantly, rather than developing targeted programmes for migrants, the city declares the adoption of a mainstreaming approach in the context of all potentially marginalised groups.

Gender in IIPs

Even though gender-related needs remain largely absent from key policy documents, they could still be indirectly included in available policy tools. The Act of 12 March 2004 on Social Assistance[6] defines a key tool of immigrant integration policies in Poland – an Individual Integration Programme (IIP). Article 92 (§1) determines the types of support granted to foreigners on IIPs: financial support, national health insurance contributions, social work, specialised counselling, the provision of information and support in contacts with other institutions, plus other means of support in the integration process. The Act provides a very broad yet vague framework of support. It fails to specify responses to the different needs of the beneficiaries of IIPs, including those related to gender. However, the programme, by definition, implies that each beneficiary receives individually tailored support, appropriate to their needs, including gender needs. As explained by a local

administration representative interviewed in Warsaw, the available documents serve as a general guideline determining the scope of the IIP:

(...) There is, so far, no provision in our system for systematically addressing such [gender-related] *needs. The Individual Integration Programme, with which I work, is individual by name and by design. This means that if a woman comes to the programme, (...) it is the task of the social worker to identify the individual needs of this person* (GEN_ADML_1).

Yet, according to another representative of the local administration, there are very few to no guidelines on how to personalise the programmes and work with women or other groups with special needs:

A social worker who carries out an integration programme does not have too many tools or guidelines on how to do it. (...) We also always laughed with my colleagues as we read in the [Social Assistance] *Act, which is supposed to be our guideline, that the tools of a social worker are to observe* [laughs]*, to draw conclusions. (...) All that we had, what we were able to do, we worked out for ourselves through our experience of working with foreign clients* (GEN_ADML_2).

As demonstrated by the respondent, in practice, some social workers are implementing activities designed to address specific gender-related needs. One of the interviewed social workers explained that the quality of support largely relies on the social worker's individual competencies: '(...) We place our hope in what a social worker is capable of and what sensitivity he or she has' (GEN_ADML_1).

Gender and administrative and financial constraints

Study participants attributed the difficulties in implementing gender-related or gender-sensitive activities to administrative and financial constraints. According to an interviewed migration scholar, in case of activities which are not described in detail and/or mandated by law, the administration might limit its actions to the procedural essentials and highlight that efforts are confined strictly to what the procedures dictate: 'The administration often takes the safe position that if something is not clearly mandated by law, it is not there' (GEN_ACADEMIA_2). The participants linked the rareness of activities beyond those strictly imposed by laws or, in many cases, even the lack of efforts aimed at assessing the very needs, with the inadequate or scarce allocation of financial and human resources from the level of central government. Furthermore, according to one interviewee, local governments are apprehensive about conducting needs assessments which will reveal significant deficiencies and ineffectiveness, yet might not be followed by financial or staff reinforcements:

The problem is that, if the local authorities show that they are doing something, they are afraid, in my opinion, that this will convince the central authorities that, since they are doing it, it means that they can do it. They are afraid that they will get more tasks but not necessarily more finances. In my opinion, this is one of the reasons why they do not go much further in identifying integration needs. Because they are simply afraid that if they identify these needs it turns out that these needs are mega-sized (GEN_ACADEMIA_1).

Consequently, in light of the ever-shrinking welfare support systems, with social workers overwhelmed with high caseloads and lacking specific regulations, there is a high likelihood that the modest procedural essentials

will not suffice or will not be appropriate. In addition, the situation in Warsaw, as explained, is probably more specialised than in other parts of the country. As a representative of local administration in Warsaw explains:

> *(...) I think that we are lacking clear guidelines – at least, a definition of integration to be used in programmes. It seems that everyone working with the client has their vision of what should be done, how to work, and so on. I don't know, maybe it's a good thing, because maybe, thanks to this, it has a chance of being an individual programme, but I'm sure we could use a bit more general knowledge, about what integration is. We in Warsaw are in a slightly better situation because we specialise, we have employees who deal only with this. I have no other task in my job than to implement integration programmes. In most districts in Poland, however, the integration programme is simply an additional task for the social worker who deals with foster care, violence, addictions, and a bit of everything* (GEN_ADML_1).

This opinion is also shared by an NGO worker, who highlighted insufficient regulations at the administrative level on how to modify the programmes to meet clients' gender-specific needs:

> *My experience is that if the PCFA[7] or, in the case of Warsaw, the WCFA, has an employee, a social worker, who is very strongly focused on supporting a person, whether it be a woman or a man, whether it be a queer or a non-queer person, this person gets more support, but there are also PCFAs or other such employees who don't deal with these people at all, so here, probably, a focus on some vulnerable groups could also give those people... more support because, if they had this guaranteed by law, I assume that even the employees of such PCFAs would, sort of, have to comply with the law that applies to them. And it still probably wouldn't be equal, but at least in principle we would equalise access. And at the moment people with special needs, or from vulnerable groups are treated just like everyone else* (GEN_NGO_4).

This issue also highlights the challenge of accessing information about individual rights. Governmental social-support systems are often complex, making it difficult for people to obtain clear information on available resources and their entitlements. As a result, many individuals are unable to claim the rights to which they are entitled due to a lack of awareness. Ironically, those who stand to benefit the most from these systems are often those who face the greatest obstacles in accessing information about support programmes specifically designed to assist them.

> *Once one participant said, for example, that she went to the doctor and something happened there, and the other one said something else that didn't match. Or, what you can get in the OPS.[8] Each of the ladies had a slightly different experience. (...) So they had a meeting with the director of the OPS in the suburban area and they were then able to ask questions that bothered them as well as questions about how it should work. They know that everyone at the OPS was telling them that they couldn't and wouldn't do it, but they were also given information on how it should work so that when they went to the OPS later on, they would be aware that they had the right to some specific services which they had been refused before, because that's how Polish OPSs worked* (GEN_NGO_4).

Poor access to information about rights and services can be a major barrier to immigrant integration outcomes.

Gender and targeted NGO-run programmes

Interviewees explained that, following the 2022 mass forced migration from Ukraine, an influx of international funding bridged service gaps through grants offered to local NGO service-providers. The funding mainly targeted TP holders but, in some cases, was also available to other groups of migrants or forced migrants (including holders of international protection). The funds were targeted specifically at so-called 'sensitive groups', including women. The interviewees touched upon 2 interesting insights related to this. Firstly, the INGOs emerged as agents of gender mainstreaming. Secondly, our study participants pointed to a rather counter-intuitive observation related to the dynamics of shifting gender roles and an altering position of men as recipients of integration support.

INGOs as agents of gender mainstreaming

According to a representative of an NGO with experience in public administration, all grants funded by INGOs contained requirements for components ensuring the equal treatment of aid recipients and having anti-discrimination measures: 'We, (...), as a beneficiary of UNHCR funds, have to adapt organisational policies to UNHCR requirements, including anti-discrimination policies, anti-violence policies, and anti-exclusion policies' (GEN_NGO_8).

   According to our participants, the character and structure of the streams of funding might support gender mainstreaming due to the obligatory components. On the other hand, as explained by a migration scholar interviewee with an extensive background in the field of migration policies, it does not necessarily support the mainstreaming of immigrant integration as such, in the sense of incorporating gender across implemented programmes: 'I'm not surprised that we have programmes dedicated to Roma or other groups because we have some funding streams that *de facto* enable or support particular [marginalised] groups. So, paradoxically, funding does not support mainstreaming – rather, it inhibits it' (GEN_ACADEMIA_1). The participant explained that funding was largely devoted to programmes targeted at specific groups. Therefore, NGOs were more likely to seek and receive funding for targeted programmes, instead of addressing gender across all programmes.

> *If we start from such an ideal situation, i.e. we assume that we have a certain level of needs satisfaction, then we may wonder whether we have mainstreaming or, rather, targeted activities – but what happens when we know that these needs are not ensured? I mean, is it not then perhaps better, for example, to target these different activities? It may turn out that, on a purely practical level, it is easier – because we can, for example, reach for funds which are targeted, which can be used to support one group and not another. And in this sense, Poland is in an interesting place, but also a difficult one, because we have all these things overlapping* (GEN_ACADEMIA_1).

Unintended policy outcomes: shifting gender roles

Another interesting aspect pointed out by our study participants was the change in the dynamics of gender relations amongst recipients of integration support – that is, related to its allocation. As explained in the previous section, financial flows of humanitarian aid to Poland favoured targeted actions aimed at vulnerable groups, including women. Yet, post-2022 forced migration to Poland included a majority of women, children and the elderly. Consequently, a vast majority of programmes were planned for women and children (including

TP-holders and other protection-holders). As one of the participants explained, men were not considered a sensitive group and therefore they were overlooked in integration activities:

> *This was shocking but, in connection with this Ukrainian response, (...) suddenly men have become a vulnerable group, which is in general a kind of strange and unexpected finding. You know, there are so many programmes designed – not only gender-based violence but just in general so many programmes are designed – for women (....)* (GEN_NGO_3).

An interviewed social worker explained that it influenced migrants' familial relations in that women would take over the role of interacting with private and public support institutions:

> *When I had the opportunity to visit the centres for foreigners, [I noticed] that there is a very big offer of activities for women. We cook together, we sew together, we have some other activities together. Men, on the other hand, sit and wait. I haven't come across an offer of activities specifically for men. (...) and observing this, you get the impression that a man in a situation of migration is in a slightly more difficult position, especially if he was previously the dominant person in his family. Dominant in the sense of head of the family, supporting, working and so on. And in a migration situation, he has become powerless. What I have observed is that, very often, women take the initiative, while men sink into themselves. (...) Even observing the activities of various NGOs in Warsaw, everywhere there are these different groups and activities. I see women who go to classes, who show their work, for example. Very rarely do men appear somewhere in these groups of beneficiaries* (GEN_ADML_1).

As demonstrated by the interviewee, as a result of the policies, the gender dynamic within forced migrant families changes, such that men shift from being the main provider of the family to the one who relies on his wife's assistance and capabilities. Unfortunately, as this migration scholar explains, such unprecedented empowerment of women results in increasing frustration among men:

> *There was research on the Chechen community and such issues of relations in families and problems with violence, which may be a result of men losing their role as the head of the family, the traditional role, or it may be reinforced – let's not conclude about the causality, but it may be reinforced by this. It may also be reinforced by the fact that women are the ones to whom most of the help is directed, they are the ones who go to these offices, they have support for children, they go to the social welfare centres and so on, so they are suddenly the ones who bring this money or some support home, and these cultural roles are reversed, which causes frustration in men, who also find it difficult to find a job* (GEN_ACADEMIA_2).

The respondent stresses that, as it relates to complex social phenomena, definitive causality cannot be established. Yet, the perceived shifts in family and gender structures might be an interesting outcome of the governance of immigrant integration.

Discussion and conclusion

This study aimed to map out and critically assess how the gender-related needs of forced migrant women were addressed in the governance of immigrant integration. The results reflect Phillimore's (2020) refugee integration opportunity structures, with discourse, structure, initiatives and support as the most visible in the analysed case. Using a gender lens, the current study contributes to Phillimore's framework by highlighting the nuanced nexus

between gender and migration governance. By adopting a gender-oriented, as well as a gender-sensitive perspective, the study uncovered gender as a determinant of the ways in which migration is governed and, by extension of the integration outcomes.

The discursive opportunity-structure – i.e. media and policy – shapes the reception of receiving communities towards newcomers (Phillimore 2020). Farris (2017) reveals how the colonial past determines the orientalisation of migrant women, while Finland attributes patriarchal relations exclusively to them (Rajas 2012). Conversely, while in Poland the orientalisation of racialised persons also takes place, 'othering' strategies vary. As indicated in my results, they rarely address presumed immigrant men's inherent misogyny, as described by Farris (2017). The figure of non-white migrant men is frequently portrayed as a potential perpetrator of sexual violence against women, contributing to a perceived threat to the safety of Polish women (Bloch 2023:50). However, this discourse is rarely extended to broader conversations about gender equality. Unlike in Finland (Rajas 2012), France, Italy or the Netherlands (Farris 2017), in Poland gender equality is not seen as one of the values threatened by the influx of migrants, because gender equality is hardly considered to be a part of the national identity 'in danger'. As evidenced by this study, the tendencies and the concepts present in the literature from old immigration-destination Western European countries are not entirely accurate in the context of Poland.

Secondly, the opportunity structure which Phillimore deems crucial in facilitating integration is the availability – or lack – of a range of integration activities at the state level. The current analysis showed that, although the gender-specific needs of women are widely responded to by programmes implemented by NGOs in Warsaw or in cooperation with them, this is rarely done at the state level. Document analysis has revealed how gender remained absent from policy documents. Aside from one document which has never been adopted, no migration and integration-related documents mentioned gender. The only legally defined instrument of immigrant integration, the IIP, offers no gender-specific components dictated by law. Interviewed social workers claimed having received no guidance on how to address the special needs of refugee women. Instead, they relied on their experience. Consequently, on the practice level, some social workers implemented gender-sensitive approaches, while others did not, depending on the workers' individual capabilities. As previously discussed, government entities might refrain from identifying problem areas to avoid acknowledging the existence and scale of issues which might require urgent action. According to Penninx and Garcés-Mascareñas (2016), such a choice for a non-action or non-policy is also a policy in itself, as it demonstrates the state's rejection of responsibility for issues not deemed worthy of allocating the already scarce resources. While NGOs bridge these service gaps, gender-specific services remain an option but not a migrant right. To some extent, incorporating gender into integration programming has been facilitated by the humanitarian crisis at the Polish-Belarussian border, as well as the full-scale invasion of Ukraine by Russia, which carried along unprecedented extensive financial support from INGO grant donors. As revealed by the study participants, the INGOs required gender-sensitive components or targeted approaches in the programmes they funded.

As indicated in existing studies, structural factors related to immigration and border regimes need to be considered as an opportunity structure limiting integration outcomes (Phillimore 2020). Even though 'mainstreaming' has been a strategy in the policy-making of many European countries and has applied to both gender equality and immigrant integration, the approach is often misunderstood and excludes much-needed equity measures (Westerveen and Adam 2019). This trend is also reflected in the Warsaw case analysed in this article. As described by Winiarska *et al.* (forthcoming), the city of Warsaw increasingly adopts mainstreaming strategies of both gender equality and immigrant integration. Yet, as the current study also revealed, programmes where both gender and refugee needs intersect are missing, both at the central and the local administration level. Although the IIPs are, by name and by design, 'individual' and therefore should be tailored to the needs of each person, as revealed in this study, the lack of precise guidance on gender needs

results in uneven quality of the services. A refugee woman fortunate enough to encounter a committed and experienced social worker who is not burdened with an excessive workload has a greater likelihood of receiving appropriate assistance. Yet, a less-fortunate refugee client will lack such tailored support and the opportunities that could come out of it. Unlike these public programmes, the NGO-run ones specifically targeted refugee women but they cannot scale up their activities in the way that public programmes can (Łukasiewicz *et al.* 2021).

Gender-sensitive programmes, however, do not guarantee gender equality. As revealed in the current study, women participated in integration activities offered to all migrants, regardless of their gender, more often than men, yet this perceived empowerment of women might be inaccurate, as described by Szczepanikova (2012) in the case of Chechen refugees. Seeking support may simply be considered undignified and thus falling onto the shoulders of women.

To sum up, unproblematised rationalities in the governance of immigrant integration, which lack an intersectionally sensitive perspective, might hinder gender equity and negatively influence the integration outcomes. Therefore, it is crucial that immigrant integration policy-makers and service-providers alike allocate more attention and resources to the matter of gender and the special needs which may result from it in the way in which immigrant integration is governed on all levels. This includes providing mandatory staff training, developing gender-sensitive programmes and ensuring appropriate outreach, engagement and evaluation strategies, implementing wide-range gender-responsive and gender-sensitive policies and designating specific budget streams for addressing equality, as well as equity, in a sustainable, long-term manner.

Notes

1. I use the word 'refugee' to indicate people who applied for and received international protection, i.e. a refugee status or subsidiary protection. The article's primary focus is NOT on the largest group of forced migrants in Poland, i.e. Ukrainian holders of Temporary Protection, to whom a large number of NGO-run integration activities are addressed. Instead, I look at the groups that are more contested in the public discourse and often viewed as 'undeserving' refugees (Klaus and Szulecka 2023).
2. Other gender-specific issues fall beyond the scope of this article and therefore require further studies.
3. Although Poland did not have overseas colonies, like many Western European countries, it is argued that Poland had a colonialist policy towards the former Eastern borderlands of the Polish-Lithuanian Commonwealth (Kresy) – see e.g. Mick (2014).
4. Including 3 conducted together with the PI of the research project.
5. To maintain the confidentiality of my participants, each interview has been assigned a code indicating the participant association: NGO – participants linked to non-governmental organisations; ADML – participants employed in the local administration; ACADEMIA – migration scholars. Additionally, each interview was assigned a number corresponding to the order of interviews in a given category. All quotes are translated from the Polish language by the author of the article.
6. All citations of policy documents were translated from Polish by the author of the article.
7. (pol. Ustawa o Pomocy Społecznej 2004) (uniform text Journal of Laws of 2024, item 1283, 1572 with further amendments).
8. Poviat Centre for Family Assistance.
9. Social Welfare Centre.

Conflict of interest statement

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The Language Rights of Ukrainian Minors Enjoying Temporary Protection in Poland in the Field of Education

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This article addresses the issue of the language rights of Ukrainian school-aged children who arrived in Poland – mostly with their mothers – as refugees fleeing the full-scale Russian invasion of Ukraine, launched on 24 February 2022 as an escalation of the war started in 2014. The paper attempts to systematise the existing knowledge on language rights in the field of education conferred on Ukrainian children enjoying temporary protection in Poland against the background of Polish language policy. The paper relies mostly on the legal-dogmatic method and document analysis. In order to achieve this goal, the article draws on a literature review in the field, the existing estimates, as well as the relevant data on the implementation of the Polish language policy in the area of education. The study identifies key linguistic aspects of the right to education by Ukrainian children attending Polish schools, including provisions for learning Polish as the official language of a host state. This involves preparatory classes and the right to learn foreign languages on the same basis as Polish schoolchildren. Finally, the paper tentatively assesses the actual implementation of the above rights and indicates the need for further empirical research in this area.

Keywords: language rights, Ukrainian minors, language policy, education policy, minority language, rights and obligations of children with temporary protection in Polish education

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Introduction

Europe has become a destination for significant migratory flows in recent decades. The European Union Member States institutions have been forced to cope with the consequences of growing multiculturalism and multilingualism. Progressively diverse societies in Europe have posed a number of significant challenges for the different levels of public-administration authorities of destination states. Undoubtedly, language-related matters are one of the main tasks aimed at migrant integration, where education should certainly be an area of special attention. As more and more children of different national, ethnic and linguistic groups attend the same schools, language competence plays a key role in the official handling of migrants. Language skills are crucial for school achievement and a lack of command of the host state's language may cause social functioning disorders and prevent the successful integration of third-country minors. Migrant children struggling with language deficits usually experience adaptation and educational problems. In this context, the question arises as to what kind of language policy in the field of education should be pursued by the state authorities in order to assure fundamental language rights for migrant children in schools and thereby to facilitate their integration with their host-state peers. This general issue needs an in-depth analysis of the existing language policies in the field of education run by each EU Member State.

The need for a detailed scrutiny of language policies in the area of education also appeared to be a burning issue with reference to Poland. The outbreak of full-scale war in Ukraine on 24 February 2022 drastically changed the migratory situation in Central and Eastern Europe. The war triggered a huge influx of Ukrainian refugees to Poland – mainly women with children. In total, the number of people who crossed the Polish border from war-stricken Ukraine between 24 February 2022 and 31 December 2023 amounted to 18.1 million (Sas 2024). As of 11 June 2024, there were almost 1 million refugees from Ukraine in Poland (Statista Research Department 2024). This unprecedented inflow of war refugees revived the issue of future developments and challenges related to the presence of Ukrainian citizens in Poland. At this juncture, it must be noted that Ukrainians staying in Poland constitute the sum of 2 major sub-populations of those who were residing in Poland before the war began (estimated at 1.35 million) and those who arrived after 24 February 2022 (around 1.55 million) (Duszczyk and Kaczmarczyk 2022: 8).

The influx of Ukrainian citizens to Poland strongly increased the number of Ukrainian children attending Polish schools. Ukrainian minors constitute the largest group of non-native students in the Polish education system. Before the war, there were 60,000 Ukrainian students in Polish schools (Związek Nauczycielstwa Polskiego 2022). The outbreak of the war caused a sudden surge. According to data released by UNICEF and the UN Refugee Agency (UNHCR) in September 2023, around 134,000 children from Ukraine were enrolled in Polish primary and secondary schools, while data published by the Union of Polish Metropolises indicated that the number at the beginning of the 2023/2024 school year amounted to 161,111 (Centre for Analysis and Research of the Union of Polish Metropolises 2024: 9).

Attempts to tackle the changing language reality in Poland have been made by linguists, philologists and lawyers. The issue of the implementation of language policy in the Polish education system was already vividly discussed by researchers, both prior to and following Poland's accession to the European Union. At that time, scholars focused on the European aspects of the policy, in particular the EU's respect for the linguistic diversity of its Member States and the actions taken to follow the EU's multilingualism policy (Komorowska 2004; Pawłowski 2008; Pisarek 2007; Poszytek 2011). The research was continued, along with the increased movement of EU citizens and constantly growing number of both EU and third-country migrants. The research done thus far has exposed the following language-related issues and problems in the field of education: the complicated nature of minority languages protection and the issue of collective identities (Gajda 2019), the challenges related to the inclusion of migrant children into the education system (European Commission,

European Education and Culture Executive Agency 2022; Ostafińska-Molik and Olszewska-Gniadek 2020; Wąskiewicz-Firlej 2021), the actual access of migrant children to Polish schools and the challenges related to the inclusion of a large number of Ukrainian children into the Polish education system (Kurzyna-Chmiel 2020).

While appreciating the above studies, there is a well-grounded reason to study the language rights of Ukrainian school-age minors against the background of Polish language policy in the area of education. The literature in the field still remains scarce and significant gaps can be identified, including that on the legal aspects of the Polish language policy in education. This relatively new reality in Polish schools requires a comprehensive study. This article attempts to systematise the existing knowledge; the analysis will focus on Poland's legal framework of language and education policies, paying special attention to Ukrainian minors' right to learn Polish as the official language of a host state; this includes the provision of preparatory classes, the right to learn foreign languages on the same basis as Polish schoolchildren as well as their duty to attend school (compulsory education). I claim that Ukrainian children attending Polish schools enjoy specific language rights in the field of education resulting from both Polish language policy as well as EU law. Moreover, I maintain that the implementation of children's language rights strongly affects the inclusion of Ukrainian children into the school environment and Polish society and that its lack may cause a sequence of educational and adaptation problems. Finally, in a broader sense, the article attempts to contribute to a better understanding of migrant children's integration through the realisation of the state's legal obligations resulting from language-related laws. Due to space limitations, the legal-dogmatic analysis of instruments is narrowed down to the relevant national law – such as the Constitution of the Republic of Poland and Acts of Parliament – as well as the relevant EU law on its language policy, where I analyse the extent to which this affects Polish language policy. As far as the research data are concerned, the article draws on a literature review of the field, the analysis of statistical data and of data on the actual implementation of the Polish language policy in the area of education.

The article is structured as follows. Firstly, the theoretical background to the notion of language policy will be presented. Secondly, the major actors, goals and legal grounds of the Polish language policy, in particular with reference to its educational aspects, will be examined. Thirdly, the impact of the European Union's language policy on the Polish language policy will be scrutinised and conclusions drawn. Fourthly, the article will analyse the scope of language rights conferred on Ukrainian children enjoying temporary protection, based on Polish language policy in the field of education and applicable EU laws. The following key aspects will be analysed: the rights and, at the same time, the obligation of Ukrainian school-aged children to learn Polish as the official language of the host state and the right for them to attend additional classes for Polish language-learning, as well as the impact of the EU law on the children's right to learn foreign languages. Finally, the conclusions from the analysis will be drawn and suggestions for further studies put forward.

Language policy and its components

The notion of language policy had already been broadly analysed by linguists and sociolinguists four decades earlier. The concept of language policy was defined *inter alia* by Lubaś (1975, 1977), Cooper (1989), Kaplan and Baldauf (1997), Gajda (1999), Bochmann, Szépe and Derényi (1999), Pisarek (1999), Ricento (2000) and Pawłowski (2006). Lubaś defined language policy as a deliberate activity of institutions and individuals (scientists, artists, politicians) which is planned in advance in order to bring positive social effects in all areas in which human speech plays a significant communicative role (Lubaś 2009: 35–39). For Cooper (1989), language policy meant as much as traditional language planning, aimed at correct and smooth communication in a community or society. The same view was later shared by Pawłowski (2006). Kaplan and Baldauf (1997) underlined that language planning was a practical realisation of any language policy. Bochmann *et al.* (1999) introduced a broad definition by stating that language policy was a politically motivated interference into the

language issues of a community. Such a definition included a wide range of issues related to language planning, language acquisition and language-related legislation. Although Bochmann *et al.*'s definition did not clarify the scope of language policy, notice should be taken of the fact that it stressed the key role of language in establishing individuals' identity and determining their roles in society (Bochmann *et al.* 1999). Gajda stated that the concept of language policy referred to all activities undertaken in a given community which were aimed at shaping its language situation. According to him, a comprehensive presentation of the concept of language policy required consideration of a number of its elements, including the context in which the language policy is implemented, the policy actors and performers, its objectives, its subject as well as the means and methods of its implementation (Gajda 1999: 11). Pisarek also stressed that language policy should be understood as all deliberate activities aimed at the formation of desired individual and collective language behaviours. He classified language policy as part of the cultural policy of the state and other entities representing national values, including certain components of information policy of the state and fulfilling an integrating function (Pisarek 2008: 42). The definitions of language policy introduced by linguists were not fully consistent and exposed different aspects of the notion. However, they had a common denominator which amounted to the deliberate and motivated nature of activities undertaken by institutions and individuals and aimed at shaping and influencing the language situation of a community.

Accordingly, language policy is a multi-faceted discipline and the achievement of its objectives entails three main aspects – legal, cultural linguistic and educational (Pisarek 2008: 42). For this purpose, the competent state authorities are obliged to adopt the relevant statutes to enable the carrying out of the appropriate information, educational and cultural policies and to undertake appropriate measures and actions. The legal aspects of language policy relate to all relevant regulations imposed by the state in the scope of the language (languages) and its (their) use. Cultural and linguistic aspects include the totality of ideas, values, beliefs, attitudes, prejudices, myths, religious structures and all other cultural 'baggage' that speakers contribute to the language from their culture. Educational aspects of language policy aim at language acquisition and teaching. These three aspects – cultural, linguistic and educational – are interrelated and affect one another. Pisarek noticed that the legal aspects of language policy should be brought to the forefront in all decisions concerning the privileging of a particular language. In fact, the legal and regulatory aspects of a language determine the shape of the policy and form the grounds for any implementation activities.

All the three major aspects of a language policy are reflected in language planning, which constitutes its actual phase of implementation. Language planning is carried out by competent authorities in order to sort out language issues within a community and to influence the behaviour of the community members with respect to the acquisition, structure or functional allocation of their language codes (Cooper 1989: 45). Language planning is broken up into three components: status planning, acquisition planning and corpus planning. The terms were coined and defined by Haugen (1959). In principle, status planning within language policy constitutes the major level of language planning which affects the social and legal position which will be assigned to a language. As status planning remains within the competence of the state, the result of this process is the publication of all relevant regulations imposed by the state. In the course of status planning, the variety(ies) of a language or languages that become official in a state and serve as a medium for its institutions, are established; by way of this, the means for interaction between the state and citizens are determined. Acquisition planning is a derivative of status planning, as relevant regulations adopted in the area of language acquisition must be compliant with the superior legislation specifying the status of languages. Although language acquisition is strictly related to education, it is a powerful tool affecting the shape of any language policy (Łuczak 2010: 10). Corpus planning remains beyond the scope of this article.

Polish language policy in the field of education – actors, goals and legal grounds

Language policy in Poland is conducted by a number of major actors. Firstly, it is state authorities, in particular the Polish parliament, which enact the relevant national law – and the competent ministries which then adopt the implementation of the acts. Secondly, an important role is played by the Council of the Polish Language, which sets the rules of orthography and interpunctuation of the Polish language. Moreover, at the request of the empowered authorities, the Council analyses and critically evaluates all important issues relating to the use and development of the contemporary Polish language. By 2018, the Council had provided about 5,000 expert opinions. Thirdly, educational institutions, including state, regional and local ones, may shape language policy. Their impact seems to be lower than in the case of the central authorities; nevertheless, they often take actions aimed to protect the interests of local communities which may run counter to the national interests. One example is the lack of consent for the closure of the Lithuanian school in Widugiery, where 9 Lithuanian students were taught, although the Act on the Education System allowed the communes' authorities to close schools without the necessity to take into account the opinion of the school superintendent (Wiertlewski 2011: 105). Next, the impact on Polish language policy is also exerted by the actions of quasi-state and non-governmental organisations, such as the Polish Organisations Pooled Fund, which gathers together 19 organisations acting for the inclusion of migrant children into Polish schools.

The most important goals of Polish language policy have not changed since 1999. First and foremost, they include the preservation of the vitality of the Polish language, its presence and conditions for development in all areas of social life, thus ensuring its status as the first official language in Poland, the modification of the Polish language curriculum and teaching methods in school and the popularisation of the knowledge of other languages in Poland, as well as providing the conditions for the preservation and development of national and ethnic-minority languages in the state (Mazur 1999). In order to satisfy the policy objectives, the Polish state should help foreigners legally residing in Poland both to learn Polish as a foreign language and to teach them in their native language (Pisarek 2007). At the same time, all foreign school-aged children residing in Poland, including the children of irregular migrants, are obliged to attend school. Since 2009, knowledge of the Polish language at a minimum level of B1, confirmed with an official certificate, has become necessary to obtain Polish citizenship (Article 30(2) of the Act of 2 April 2009 on Polish Citizenship) and to obtain the status of anok EU long-term resident (Article 211(3) of the Act of 12 December 2013 on Foreigners).

The legal grounds for Polish language policy are dispersed in a multitude of legal acts, the primary legal basis being the Constitution of the Republic of Poland of 1997 (Journal of Laws of 2009, no. 114, item 946). The Constitution mentions the language-related matters in three places. Firstly, Article 27 of the Constitution states that 'Polish shall be the official language of the state in the Republic of Poland. This provision shall not infringe upon national minority rights resulting from ratified international agreements'. Next, Article 35 (1–2) of the Constitution provides that

> *1. The Republic of Poland shall ensure for Polish citizens belonging to national or ethnic minorities the freedom to maintain and develop their own language, to maintain customs and traditions and to develop their own culture; 2. National and ethnic minorities shall have the right to establish educational and cultural institutions, institutions designed to protect religious identity, as well as to participate in the resolution of matters connected with their cultural identity.*

Finally, Article 233(2) sets forth that the '[l]imitation of the freedoms and rights of persons and citizens only by reason of race, gender, language, faith or lack of it, social origin, ancestry and property shall be prohibited'.

The issues related to the use of the Polish language are specified in the Polish Language Act of 7 October 1999 (consolidated text, Journal of Laws of 2021, item 672). The Act, which was drafted in view of Poland's potential accession to the European Union, sanctions the protection and correct use of the Polish language, its implementation in the public sphere and its popularisation abroad. The Act defines the rules of using the Polish language in relation to foreign languages in education, legal transactions and culture as well as the principles for certifying proficiency in Polish as a foreign language. The Act regulates in detail the issue of the official attesting to the knowledge of the Polish language as a foreign language by obtaining a certificate issued following the positive result of the exam passed in front of the State Commission. The Act enables the person who graduated from a higher, secondary or supranational secondary school operating in the Polish educational system – and who holds a certificate of maturity – to obtain the certificate without the need to pass the examination. Finally, the Act provides for the legal grounds of the operation of the Council of the Polish Language – established in 1996 at the presidium of the Polish Academy of Sciences – to serve as a consultative and advisory body obliged to report to the Polish parliament on a biennial basis. Another legislative act referring to the language policy of Poland is the Act of 6 January 2005 on National and Ethnic Minorities and on the Regional Language (consolidated text, Journal of Laws of 2017, item 823). The Act recognises 9 national minorities living in Poland, such as Belarusians, Czechs, Lithuanians, Germans, Armenians, Russians, Slovaks, Ukrainians and Jews, 4 ethnic minorities – the Karaites, the Lemkos, the Roma and the Lipka Tatars, as well as 1 regional language of Kashubians. Article 8 of the Act expressly provides that persons belonging to a minority have the right to learn their minority language or to be instructed in this language. Article 17 specifies that the exercise of the right of persons belonging to the minority to learn or to be instructed in the minority language shall be performed in accordance with the principles and procedures specified in the Act of 16 September 2021 on Education System (consolidated text, Journal of Laws of 2024, item 750). In this context, it should be noted that Poland has entered into bilateral agreements/treaties with the respective states regulating the issue of protecting the language rights of national minorities residing on its territory. For instance, the Treaty between the Polish Republic and Ukraine on Good-Neighbourliness, Friendly Relations and Cooperation was concluded in 1992 (Journal of Laws of 1993, no. 125, item 573). In Article 11 of the Treaty, the Parties mutually agree that international norms for the protection of national minorities shall apply, including the right to learn the mother tongue or to be instructed in this language.

Language issues are an important component of the laws concerning the state's education system and have a special dimension in the context of educating foreigners in Polish schools. The Polish Constitution expressly states in Article 70 that everyone has the right to education, education up to 18 years of age shall be compulsory and education in public schools is guaranteed without payment. On the one hand, the right to education obliges minors under the age of 18 to attend school in Poland and, on the other, it obliges public authorities to organise education in such a way that a sufficient capacity of schools for the entitled persons is assured. Such formulation of the provision confirms the universal nature of the right.

The legal basis for the education of non-Polish citizens in Polish schools is entrenched in the Act of 14 December 2016 – Education Law (consolidated text, Journal of Laws of 2024, item 737) and further specified in the Regulation of the Minister of National Education of 23 August 2017 on the Education of Persons Who Are Not Polish Citizens and Persons Who are Polish Citizens Who Have Received Education in Schools Operating in the Educational Systems of Other Countries (Journal of Laws of 2022, item 645). As stated in Article 165(2) of the Act, non-Polish nationals who are subject to compulsory education enjoy the right to be educated in public primary schools, art schools and public institutions under the conditions applicable to Polish citizens. The responsibility for the fulfilment of children's compulsory education falls on their parents. The equality of access to the Polish education system is understood mainly through the same rules for the fulfilment of schooling obligation, 1-year compulsory preschool education and compulsory education (Kurzyna-Chmiel

2020: 88). Article 165(11)-(13) of the Act establishes the legal grounds for opening preparatory branches for non-Polish citizens with the aim of facilitating their adaptation to Polish schools. Article 16 of the Regulation further specifies that preparatory branches may consist of a maximum of 25 students. According to Article 16(9) of the Regulation, the Polish language may be taught in accordance with the curriculum developed on the basis of the framework programme of Polish language courses for foreigners at a minimum scope of 6 classes per week. Moreover, Article 165(7) of the Act creates an opportunity for non-Polish nationals – who do not know the Polish language or who only know it at a level insufficient to benefit from education in Polish schools – to attend additional free-of-charge classes of Polish language for a period no longer than 24 months. In turn, Article 17 of the Regulation specifies the manner of class organisation and the scope of the language classes at a minimum of 2 classes per week. Such additional classes must be organised by the communal/municipal authorities having jurisdiction over the place of residence of a given person (Kurzyna-Chmiel 2020: 95).

Impact of EU language policy on the Polish language policy in the field of education

At the beginning of European integration, the right to education was perceived to be exclusively a national value. For this reason, the Community was not conferred any powers to carry out education policy. Yet, the evolution of the EU legal order resulted in the linking of education matters with the free movement of Union citizens. As a result, the right to education at the supranational level was limited by residence restrictions and by the secondary legislation, in particular Directive 2004/38/EC (OJ L 158/77). The inclusion of Article 14 into the Charter of Fundamental Rights, which became binding law upon the ratification of the Treaty of Lisbon in 2009 (OJ 2016 C 202/2), expressly providing every individual with the right to education, reaffirmed the fundamental nature of the right guaranteed in the constitutional constitutions of the Member States and in Article 2 of the Protocol to European Convention on Human Rights (2007 C 303/02). As a result of the EU legal developments, the substantive scope of the EU right to education includes: 1) the right to access education and vocational training, including the right to study, train and research in another country of the EU under the same conditions as the nationals of the host state; 2) the right of residence in that state for the length of the education; and 3) ancillary social rights, such as social-security cover and social benefits, maintenance aid or grants (Peers, Hervey, Kenner and Ward 2021: 419). Nevertheless, given the fact that the competence to provide education is the domain of the Member States, Article 14 became relevant mainly in litigation concerning freedom of movement and equal treatment, most probably in combination with Article 45 of the Charter on the freedom of movement and residence, which is confirmed by the 'post-Lisbon' case law of the Court of Justice of the European Union. Hence, it is still the state that must establish an education system, make it accessible and ensure the enforceability of an individual's right to education. Article 14 of the Charter seems to add no substance to the right itself but it solely stands witness through the principle of equal treatment of EU citizens. In this sense, it constitutes an additional legal benchmark in the area of education (Peers *et al.* 2021: 420–421). Such a legal framing of the right exposes the importance of the status of the right to education under international-law instruments binding upon the EU Member States. Therefore, any solutions to the problematic aspects of the right to education in a particular language must be searched in the general principles of Union law, in particular in the ECHR and other relevant international law instruments.

Like the education policy, the competence to conduct language policy within the EU is granted to Member States. Hence, every Member State, including Poland, runs its own language policy. Nevertheless, one cannot oversee the impact of Poland's accession to the European Union in terms of Polish language policy. On the one hand, the accession contributed to a greater care for the proper protection of the Polish language and its intensive promotion in the Community. On the other hand, the EU language policy has exerted a noticeable impact on the shape of the Polish language policy in respect to foreign-language-learning policy. The EU

multilingual language policy has two strong components of status planning and acquisition planning. The former is realised based on 24 official languages, the aim of which is to express the EU's respect for the linguistic diversity of its Member States, as entrenched in the core values on which the Union is founded (Article 3 of the Treaty on European Union) and incorporated into the Charter of Fundamental Rights (Article 22), having the status of a fundamental right in the EU (OJ 2016 C 202/2). The latter is implemented through the Union's multilingualism strategy aimed at promoting foreign-language learning and encouraging the European dimension of education (Van Parijs 2008: 21). Under its multilingualism policy, the Union aims to maintain and protect the linguistic diversity of its Member States by both preventing the domination of 1 or more languages which would lead to linguistic discrimination and by the strong promotion of conditions favourable to foreign-language learning. The component of acquisition planning is also described as an EU language-learning policy or multilingualism strategy. This component of the policy is based purely on soft law having no binding force upon the Member States and their residents. In this context, it is clear that this part of the EU language policy seems to have social and economic implications rather than legal ones. Nevertheless, the strategy is worth discussing as it is the part of the EU language policy the most recognised by the EU Member-State citizens, who associate it mostly with student exchange programmes such as Erasmus +. The EU also stresses the social benefits of knowing foreign languages and cultures – such as better understanding, intercultural communication, social inclusion, tolerance and enhanced mobility. The Union promotes knowledge of languages as an asset for acquiring cross-sectoral key skills, for the improvement of performance in thinking, learning, problem-solving and communicating and as a resource for creative and innovative thinking (COM(2005) 596). Actions initiated within the strategy by the Union institutions create an opportunity for a wide range of beneficiaries to participate in exchange and mobility programmes aimed at foreign-language learning. The EU maintains its multilingualism strategy in order to raise citizens' level of individual multilingualism and to foster communication between them according to the scheme '1+2', meaning that every citizen of the EU should know a native language plus 2 foreign languages, out of which 1 is a *lingua franca* and the other is the language of a neighbouring country.

Owing to the EU language policy, a significant progress in learning foreign languages within the Polish education system can be noticed. Firstly, the obligatory education of 1 foreign language from the age of 7 was introduced in Poland in 2007. Secondly, the teaching of 2 foreign languages in the 7th and 8th grades (in some schools from the 4th grade) has become standard in Polish primary schools. Thirdly, Poland adheres to the unified European Indicator of Language Competence system based on the Council of Europe Common European Framework of Reference recommended by the European Commission to specify levels of foreign-language knowledge. Next, the Content and Language Integrated Learning (CLIL) method[1] highly recommended in the European Commission's Multilingualism Strategy (COM(2005) 596) has been widely applied in the Polish foreign language education system. Notwithstanding the above, the unsatisfactory quality of teaching modern languages in Polish schools still remains a problem, as stated by experts. Additionally, although most Poles declare that they can speak at least 1 foreign language, this is not always owed to formal school education but other factors, such as attending private classes or acquiring language skills while working abroad (Śpiewak and Zaród 2015).

The implementation of Polish language policy for Ukrainian school-aged children under temporary protection

The Ukrainian population staying in Poland may be divided into 2 major sub-populations – economic migrants who came before the outbreak of the full-scale war and those subject to temporary protection who arrived after 24 February 2022. Whereas the former are, in particular, subject to the Act of 12 December 2013 on Foreigners

(Journal of Laws of 2024, item 769), the latter are subject to provisional rights entrenched in special acts of law. The very fact of the temporary nature of the law implies the possibility of the beneficiaries' return to their country of origin or their submission to other national applicable laws if they decide to stay. The foreigners' legal status affects some of their language rights, in particular the right to learn the Polish language. At this juncture, note should be taken of the fact that, already before the huge influx of Ukrainian refugees to Poland, Polish schools did not always comply with existing legal regulations on the provision of Polish language education and the Ministry of Education was neither supportive nor truly interested in this matter, as evidenced in the Supreme Audit Office's (NIK) reports (NIK 2015, 2020). Moreover, Poles' attitudes – filled with fears and prejudices against migrants – showed that the society was not sufficiently prepared for migrants' inclusion into social life (Wąsikiewicz-Firlej 2021: 127). Thousands of refugees fleeing Ukraine who came to Poland forced the Polish authorities to intervene in the area of the education system and Polish society to adjust to the new reality. One of the major challenges faced by the Polish authorities was the inclusion of Ukrainian minors into public schools with the aim of guaranteeing them the right to education. The insufficient capacity of schools, educational institutions and branches, the lack of teachers who speak the Ukrainian language, the shortage of funds for the implementation of educational tasks by local government units and the need to reorganise teaching in the local-government schools and institutions receiving the majority of Ukrainian students appeared to be the significant challenges posed to the Polish education system by the sudden immense increase in foreign schoolchildren (Kurzyna-Chmiel 2022). To face the challenges, the Polish authorities took a number of measures to promote the integration of Ukrainian children in Polish schools and to monitor the trajectories of Ukrainian learners. A representative example is the broad cooperation of the Ministry of Science and Education, the UNICEF Refugee Response Office in Poland, 12 municipalities and civil-society partners with the aim of increasing children's access to quality learning and provide multiple learning pathways for children not enrolled. Actions were taken to equip teachers and school staff with training on how to integrate all vulnerable children into classrooms and how to provide language classes as well as mental health and psychosocial support (UNHCR 2023).

Interestingly, the majority of Ukrainians fleeing the war after 24 February 2022 are not deemed to be refugees in Polish law. In Poland, they became a new category of beneficiaries of an *ad hoc* temporary protection resulting from the Law of 12 March 2022 on Assistance to Citizens of Ukraine in Connection with Armed Conflict on the Territory of that Country (Journal of Laws of 2022, item 583). The Law constitutes the transposition of the Temporary Protection Directive (OJ L 212) activated by the EU to offer protection for people fleeing the war in Ukraine. The Law on Assistance is *lex specialis* in particular to the other binding Acts of parliament, such as the Act on Foreigners, the Act on Granting Protection to Foreigners on the Territory of the Republic of Poland (Journal of Laws of 2023, item 1504), the Act – Education Law and the Act on Education System. The Law on Assistance includes specific legal provisions aimed at meeting the needs (including educational ones) of a new, very broad category of addressees. Based on it, other *ad hoc* solutions have been created and ministerial regulations adopted for the organisation of education for school-aged children arriving in Poland after 24 February 2022 (Kurzyna-Chmiel 2022: 361). In view of the shortage of places for Ukrainian students in schools and educational institutions, the Law establishes the legal basis for the possibility of creating so-called 'other locations for teaching, upbringing and caring activities organisationally subordinated to schools or kindergartens' (Article 51(1) of the Law on Assistance). The Law has been accordingly amended and remains in force until 30 September 2025.

A number of ministerial regulations were adopted as implementing acts to the Law in the area of the education of Ukrainian minors under temporary protection, the key one being the Regulation of the Minister of Education and Science of 21 March 2022 on the Organisation of Education, Upbringing and Care of Children and Adolescents who are Citizens of Ukraine (Journal of Laws of 2022, item 645) and its following

amendments of 8 April 2022 (Journal of Laws of 2022, item 1711) and of 13 July 2023 (Journal of Laws of 2023, item 1367) adopted in order to assure the implementation of the rights in the period of the Law's operation. In terms of languages, the Regulation includes specific provisions granting Ukrainian minors additional educational facilities; in particular, it has increased the number of additional Polish language classes guaranteed for Ukrainian children – amounting to 6 classes per week in the form of individual or group classes consisting of a maximum of 15 students.

It is noteworthy that Ukrainian children under temporary protection were not automatically included in the Polish schools. Their inclusion into the Polish education system was left to the autonomous decision of their parents/guardians and the availability of places in the relevant classes. Under Polish law, they were supposed to either apply for a place in a Polish school or submit a declaration on continuing education in the Ukrainian system to the municipality having jurisdiction over the place of residence of a minor. Still, the Polish law has protected those students who have attended Polish schools and additionally benefited from online learning in the Ukrainian system. In such a situation, students have been included in the Polish education system under the conditions applicable to citizens of Poland (Kurzyna-Chmiel 2022: 357–359).

Unfortunately, as shown by the estimates released by UNICEF and the UN Refugee Agency (UNHCR), around half of Ukrainian refugee children have not been enrolled in Polish schools (UNHCR 2023). The significance of the problem was clearly pointed out by the Polish Commissioner for Human Rights in March 2023 in a letter addressed to the Minister of Science and Higher Education, which indicated that the problems identified at the beginning of the huge influx of refugees had not been solved yet. The Commissioner noted that a significant share of Ukrainian teenagers was assumed not to be covered by either the Polish or the Ukrainian education system. He claimed that the lack of reaction of the Polish authorities to this fact might constitute the infringement of obligations arising out of international law instruments, in particular the Convention of the Rights of the Child (Michałowski 2023). The results of the survey – carried out among school principals and teachers, cross-cultural assistants as well as Polish and Ukrainian parents and schoolchildren – requested by the Commissioner proved that a language barrier was the largest challenge for all the respondents. The Commissioner stressed in his letter that it is the state's duty to take care of every child residing on its territory. Above all, the state should ensure that all students learn the Polish language and have the opportunity to make contact with their peers and to maintain their cultural identity. In his view, the Ministry of Science and Higher Education could have given more support to the establishment of Ukrainian schools in Poland and international school branches to make learning Ukrainian more accessible (Michałowski 2023).

In response to the Commissioner's letter, the competent Minister indicated a range of actions – addressed to Ukrainian citizens fleeing the war – to integrate Ukrainian children into Polish schools, in particular through establishing preparatory classes which included the intensive teaching of the Polish language and creating an Integrated Education Platform where materials and links to the Polish language-learning materials were placed (Czarnek 2023). The Minister noted that, under Article 2(2) of the Law on Assistance, Ukrainian children who remained in the Ukrainian education system were not subject to compulsory annual preschool preparation, compulsory schooling or compulsory education as enshrined in the Act – Education Law. The Minister also stressed that there were no legal grounds for monitoring whether or not these young Ukrainians who did not attend Polish schools learned online in Ukrainian schools. Despite the assurances of Minister Czarnek, the problems concerning language barriers and cultural differences as well as high dropout rates still remain unresolved. Language barriers and cultural differences constitute the major stumbling block in smooth integration. One of the measures taken to overcome a language barrier is preparatory language classes. According to the Center for Citizenship Education's (CEO) report of September 2023, the entitlement to attend 6 Polish language classes per week has been assessed as not fully exploited, which is caused mainly by unfavourable class times, the lack of properly qualified teachers and difficulties with combining learning

within both the Polish and the Ukrainian education systems. The report also reveals that conscious and structured actions for integration are quite rare at the school level, as a result of which Polish and Ukrainian children function one next to the other instead of together, which also triggers conflicts with nationality background. Another obstacle in the proper integration of Ukrainian children into Polish schools remains the shortage of cross-cultural assistants. Despite their numbers having grown, the quantity of vacancies granted to schools does not fulfil the real needs (Chorostowska 2023: 6–8). The UNHCR report published in September 2023 reiterates that the major factors for low enrolment rates are language barriers, the lack of capacity of schools to absorb new students and the hope of parents that they will soon return home to Ukraine. Only around 11 per cent of Ukrainian children attending Polish schools are able to take part in preparatory language classes, mostly due to the lack of teachers of Polish as a foreign language (UNHCR 2023: 12).

The data published on the website of the Centre for Citizenship Education, presenting the status quo as of October 2023, reveal 150,000 Ukrainian minors outside of the Polish education system, which constitutes 53 per cent of the total number of young Ukrainians staying in Poland (Chorostowska 2023: 6). The UNHCR report also showed in figures that Poland is one of the countries where the problem of Ukrainian minors' falling outside the system is of the largest scale. Moreover, the NIK's report of 2024 clearly indicates that the main reason for the lack of proper data on how many Ukrainian minors under temporary protection are outside of any education system is the fact that the competent Ministry of Science and Higher Education failed to collect any relevant data on how many Ukrainian minors who came to Poland after 24 February 2022 were taught remotely via Ukrainian online schools (NIK 2024). Similarly, no precise data have been gathered on the numbers of Ukrainian school-age children leaving to go to other countries or going back to Ukraine.

As a response to the burning problems related to the education of Ukrainian minors enjoying temporary protection, the amendment to the Act of 12 March 2022 on Assistance (Journal of Laws of 2024, item 167) was adopted. In order to reduce the high-school dropout rate, the amended Law obliges Ukrainian children residing in Poland to attend Polish schools, regardless of whether or not they also study remotely within the Ukrainian system. The new obligation entered into force from September 2024. As a result, as informed by the Deputy Minister of Education, Joanna Mucha, on 7 November 2024, 33,000 Ukrainian minors joined the Polish education system in the school year 2024/2025. In order to face the coming changes, the Ministry of National Education, in cooperation with school superintendent offices, enabled Ukrainian teachers to work in Polish schools. Before the amendment to the Law, this had not been possible due to the problems with their diploma nostrification. Ukrainian teachers could work at Polish schools as cross-cultural and teaching assistants but it was difficult (yet possible under Article 15 of the Act – Education Law) to obtain the position of full-time teachers. The Ministry saw here the potential to implement the right of Ukrainian minors to learn Ukrainian as a minority language. The lessons could be taught by teachers from Ukraine who stay in Poland. Secondly, the amended law created the legal grounds to employ cross-cultural assistants in schools whose role is to support non-Polish children subject to compulsory education who do not know the Polish language at a sufficient level to deal with the school environment and in contacts between teachers, parents and peers. Next, the amended law reduced the number of Polish language classes from 6 to 4 per week. The Ministry explained this reduction by stating that it was requested by teachers who noticed a child overload. At the same time, the entitlement period was extended from 14 to 36 months.

The final issue to note is that all schoolchildren of non-Polish origin who attend Polish schools are also obliged to comply with the rules of learning foreign languages imposed on Polish children. This results from the fact that Poland follows the EU multilingualism strategy according to which two foreign languages are taught in primary schools in the 7th and 8th grades. Most Polish schools typically provide English as the first foreign language and German or, less frequently, Spanish or French, as the second. As a consequence, children of non-Polish nationality are often exposed to three new languages – Polish, English and another foreign

language that rarely happens to be their mother tongue (e.g. Ukrainian). Much as the EU's multilingualism strategy is appreciated, in such a case, the simultaneous exposure to as many as three foreign languages, including two taught within the curriculum and in Polish, may pose additional challenges for children with a migrant background, especially during their initial adaptation to the new educational setting and the focus on mastering the language of the host state (Wąsikiewicz-Filrej 2021: 121). The research carried out by the CEO confirms that the simultaneous study of English and German as foreign languages appeared to be difficult for Ukrainian minors (Chorostowska 2023: 31).

In order to cope with the above problem, the Ministry of National Education is analysing the introduction of the possibility for Ukrainian children at Polish schools to learn the Ukrainian language. According to Minister Mucha, Ukrainian minors could learn Ukrainian, Polish and English. The Minister's main argument for introducing such a solution is to redress the balance with Polish children who learn their mother tongue and two foreign languages (Garbicz 2024). Yet, there have been no particular steps taken to implement any of the above. It is, however, certain that, beginning with the school year 2025/2026, it will be possible to pass the Ukrainian language exam as part of the secondary-school final examinations.

Conclusions

Ukrainian school-age children enjoying temporary protection in Poland are entitled to an education while staying in the host country. Their right to education is a universal one which is enshrined in international, European and the national law of Poland. At the same time, Ukrainian minors below the age of 18 are subject to compulsory education in Poland. As a result, the Polish education system must be organised in such a way that Ukrainian minors can be guaranteed the right to attend Polish public schools under the conditions applicable to Polish citizens, hence on a non-discriminatory basis. The Polish state is in charge of preparing a proper infrastructure and conditions to assure such a right. The right to education vested in Ukrainian minors enjoying temporary protection in Poland entails the following language-related components (language rights): the right (and duty) to learn Polish as a language of the host state, the right to attend additional Polish language classes and the right to learn foreign languages.

The introduction of the obligation to attend school for Ukrainian school-age children enjoying temporary protection in Poland as from September 2024 made the situation clear in legal terms. The Polish state guarantees the right to education and the addressees (Ukrainian children) are obliged to fulfill their duty to attend school and learn Polish as the language of the host state. As for the right to additional Polish-language classes, Ukrainian children who do not speak Polish are entitled to learn it in the form of additional free-of-charge classes organised by the municipality/commune authorities. However, the scope of such classes differs depending on the legal status. Under the amended Law on Assistance, Ukrainian minors under temporary protection are entitled to 4 classes per week for a period of 36 months (before that, it was a minimum of 6 classes per week for 24 months) and those not having such a status being entitled to 2 classes per week for a maximum period of 24 months. Moreover, the entitlement has not been fully exploited, mainly due to unfavourable class times and other factors such as a lack of properly prepared teachers.

In the face of the sudden and large influx of Ukrainian schoolchildren, the assurance of the right appeared to be a problem and a challenge in Polish cultural and educational spaces. It clearly showed how challenging the implementation of an obligation resulting from the language policy in the field of education might be. On the one hand, the need for Poland to fulfil legal obligations required many positive actions to be taken in quick succession; on the other, the feasibility of the process due to its scale has been very hard to complete. Although a lot of steps were taken, the process is far from successfully completed. One of the major symptoms of the failed implementation of language policy in education, consisting in effective Polish language teaching and

care for the Ukrainian cultural identity, is the high dropout rate of Ukrainian minors under temporary protection. This is still an unresolved issue which persists, the negative social and educational consequences of which may be growing. The new provisions concerning the obligation for Ukrainian children to attend Polish schools from September 2024 have exposed the scale of the problem by showing how many Ukrainian families with school-age children intend to stay in Poland and leave the country of origin.

Based on the analysis, one can state that the application of children's language rights strongly affects the integration of Ukrainian children into the school environment and Polish society; its lack may cause a sequence of educational and adaptational problems. The existing language barriers, shortage of Ukrainian language teachers, capacity of schools to absorb foreign students or lack of international school branches to make the learning of Ukrainian more accessible are considered to be the main reasons for the high dropout rate among Ukrainian teenagers remaining outside any education system. The very fact that Ukrainian parents still hope to return to their home country before long and therefore do not show an interest in integrating in the host country is also a factor affecting the status quo. Moreover, this study helps to understand that states' failure to efficiently implement language policy in schools strongly contributes to the social disintegration of young migrants. Finally, it must be stressed that the assessment of the actual implementation of Polish language policy in the field of education towards school-aged Ukrainian children under temporary protection requires further empirical studies which will include but not be limited to case studies on the real-life situations accounting for the amended Law on Assistance, the analysis of access to post-school education and bilingual education.

Next, the EU language policy exerts an impact on the language policy of Poland in two aspects. Firstly, it reaffirms the status of Polish as the official language of Poland the EU Member State. Secondly, it affects the acquisition planning component in the area of foreign-language learning. In fact, the EU multilingualism policy of '1+2' has contributed to the increase in foreign-language classes in Polish schools. This, as a natural consequence, also affects foreign school-aged children attending Polish schools who are treated on the same footing as Polish students.

One more conclusion that can be drawn from the above analysis is that migration flows significantly affect the ways in which public tasks, including those in the field of education, are carried out. The need to create new, adequate regulations and the broader burden on entities implementing public tasks – especially local government units, which carry out the majority of educational public tasks – is a real problem and challenge, perhaps for many years to come. The adoption of *ad hoc* legal solutions, as in the case of Ukrainians fleeing the war in their home country, may be necessary to look ahead and be prepared for different developmental scenarios. Another potential solution in the face of changing needs in the field of education due to the increasing numbers of newcomers would be to draw up a document that comprehensively and coherently addresses the issue of the coordination of state actions towards migration processes/non-nationals of Poland through education and language policies.

Notes

1. The method is based on teaching a new subject in a language foreign to students. Through CLIL, students not only learn a second language but also learn about a topic which is new to them.

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Ukrainian Academics in Forced Migration Caused by the Russian–Ukrainian War: Problems of Identity

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This article focuses on the problem of the migrant self-identification of displaced Ukrainian academics. The authors propose a typology of self-identities based on the different ways in which academics construct their autobiographical narratives, analysing the metaphorisation of the migration experience, the use of emotives and recurring themes and the temporal structure of narration. Three types of self-identification of Ukrainian academics in emigration are distinguished: 'mobile academics', 'refugee academics' and the transitional type of 'displaced academics'. As a result, the authors aim to highlight the dynamic nature of the process of self-identification. The experience of migration, recast in terms of mobility, was a resource that allowed 'mobile academics' to construct a more consistent academic identity under extreme conditions. 'Refugee academics' – those who were unable to take advantage of professional opportunities in forced migration – demonstrate, in their interviews, that their experience abroad directly stimulated their professional mobilisation and shaped a positive perception of their own strengths and capabilities. Finally, the transition from a 'refugee identity' to the identity of 'displaced academics' took place in the course of rethinking the meaning of one's professional activities through the lens of war and raising the significance of these activities to the level of social mission.

Keywords: displaced Ukrainian academics, refugees, mobile academics, forced academic migration, scholars at risk, Russian–Ukrainian war, oral-history interviews, migration identity

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Introduction

The start of a full-scale Russian–Ukrainian war in 2022 has created the largest migration crisis since World War II. As of 14 March 2024, 5.9 million Ukrainian refugees were officially registered around the world – most of them in Germany, Poland and other European countries (UNHCR 2024).

Ukrainian academics became part of this wave of forced migration. According to one sociological study, at the time of the survey (April–May 2022), out of 2,173 respondents, 47.2 per cent of scientists remained in their place of permanent residence, 38.1 per cent were internally displaced and 14.7 per cent were abroad (Lutsenko, Harashchenko, Hladchenko, Korytnikova, Moskotina and Pravdyva 2023: 5). According to another study (de Rassenfosse, Murovana and Uhlbach 2023: 9) at the time of the survey (Autumn 2022), out of over 2,500 respondents, 18.5 per cent of academics fled the country. Regardless of which number is the more accurate, such estimates show the general trend and point to the new challenges facing Ukrainian academia as the Russian invasion continues. Among these challenges are the current loss of 20 per cent of Ukraine's research capacity (de Rassenfosse *et al*. 2023: 5) and the danger of losing human capital in the long run ('brain drain') (Ganguli and Waldinger 2023). This is especially true since, according to sociologists, the most research-active Ukrainian academics were among the most likely to leave the country and it is estimated that as many as 2.5 per cent of all the Ukrainian academics who have fled abroad since February 24 may not return home (de Rassenfosse *et al.* 2023: 6).

On the other hand, the forced migration of academics may be seen as a form of 'brain circulation', which implies that academic migration can potentially benefit Ukraine, facilitating the transfer of knowledge and helping to enrich research practices, change the academic culture and develop international academic and general networks of support (Mucha and Łuczaj 2018). At the same time, it is stressed that the potential beneficial effect of academic migration will greatly depend on the strength of the ties between those who left and those who stayed, the balance between emigration and return and the effective functioning of the diaspora (Mucha and Łuczaj 2018: 119). Today, the Ukrainian government is taking active steps to consolidate the Ukrainian academic diaspora, creating and supporting channels of communication – for example, the website of the 'Ukrainian Science Diaspora' (https://ukrdiaspora.nauka.gov.ua/uk/). However, it was only in July 2023 that the Ministry of Social Policy began work on the Demographic Development Strategy of Ukraine (Minsotspolityky 2023). Researchers argue that concrete political measures in this sphere should be based on the analysis of academic migrants' experiences; existing sociological studies aim to explore not only the challenges which displaced Ukrainian academics face and their preferred types of support but also their plans for the future and their vision for the post-war recovery and development of Ukrainian research and education that would help turn these plans into reality (Maryl, Jaroszewicz, Degtyarova, Polishchuk, Pachocka and Wnuk 2022).

Nevertheless, going forward, an in-depth conversation about the current state of Ukrainian academia and its future prospects is not possible without understanding academics' behavioural strategies in extreme circumstances. This involves exploring changes in professional self-identification during forced migration and answering questions such as how pre-migration experiences affect the shaping of the identity of Ukrainian academics and how changes in their self-identification during forced migration can potentially influence their strategies of professional behaviour in the future.

Theoretical background and methodological approaches

Studies on the contemporary forced migration of academics are expanding rapidly, owing in large part to the intensification of war-related threats to higher education over the last 15 years. Researchers in this field focus, first

and foremost, on the complex and varied nature of forced migration – together with the agency and self-perception of displaced academics – and endeavour to overcome the conceptual limitations of the term 'refugee' (Yarar and Karakaşoğlu 2022) and bridge the dichotomy between the study of 'voluntary' and that of 'forced' migration (Burlyuk and Rahbari 2023: xvii).

Important contexts for exploring the agency of displaced academics include their living and working conditions in host countries and the migration policies and discourses with which they have to deal. There is a growing body of critical research on humanitarian political, media and aid discourses that victimise refugees in general (Newman 2003; Papadopoulos 2021) and refugee academics in particular (Pherali 2020). One example is the study of programmes for scholars at risk. Researchers recognise their importance but criticise them for their provisional humanitarian nature, which does not promote long-term shared responsibility for the protection of academic freedom (Vatansever 2022a: 105–106, 116). Researchers stress that, by victimising academics and treating them as an anonymous group, the approach taken by programmes based on humanitarian compassion leads to an underestimation of the competences and abilities of academics (Özdemir 2021: 13). In some European countries, these programmes also require their recipients to have the formal status of refugee. Another moral dilemma is that, despite their humanitarian nature, the programmes prioritise research excellence and career prospects (Axyonova, Kohstall and Richter 2022: 19–20). At the same time, because of their short duration, scholarships for academics at risk force their recipients into a nomadic lifestyle and thus impose on them the burden of a 'negative reputation' (Vatansever 2022a: 113). So, despite the reluctance of academics to accept the label of 'refugee', the realities of life, the rules of the game and the dominant discourses make the refugee lifestyle an integral part of their experience (Pherali 2020: 95).

The situation of Ukrainian academics is somewhat different. Coming under the Temporary Protection Directive, which was implemented by the EU Council on 4 March 2022, Ukrainian academics enjoy broad rights in their host countries – most notably, access to the labour market, social security systems and equal remuneration in accordance with the general laws in force in each EU member state.[1] Furthermore, the unprecedented wave of academic support for Ukrainian scholars after 24 February 2022 encouraged various assistance initiatives not only from specialised programmes and funds but also from national research funding bodies in various countries, individual universities, museums and other cultural and educational institutions, which often offered temporary or permanent contracts to Ukrainian scholars. This, of course, hardly makes Ukrainian academics' situation stable (not only in Europe but also in Ukraine); however, it does make their experience more diverse and affects forms of self-perception and agency at both the personal and the collective levels.

The agency of academics is an umbrella term that gives additional meaning to migrants' practices and experiences, from recognising forced migration as a decision-making act (Yarar and Karakaşoğlu 2022: 15) to the tasks of establishing new academic networks and intervening in the complex fabric of knowledge production in their host environments in order to intensify exchange between epistemic communities which, otherwise, have little opportunity to intersect (Axyonova *et al.* 2022: 21). In this connection, integration strategies and their conditions represent another important subject for analysis. It is interesting to note here that academic integration, associated with forced internationalisation (Vatansever 2022a: 107), is a modern phenomenon. During earlier waves of Ukrainian emigration, in the aftermath of the civil war of 1917–1921 and World War II, academics tried less to integrate into the already existing European institutions and more to establish institutions of their own in Europe and North America in order to preserve the Ukrainian tradition of scholarship in the humanities (Portnov 2008; Zavorotna 2020).

Assimilation projects intended to overcome foreignness tend to experience cultural failure (Yuval-Davis 1997: 60). Migrants are always characterised by the feeling of being 'in-between', on the borderland, in transit between the host and home countries (La Barbera 2015: 3). Academic migrants often long to go back (Pherali

2020: 93) and try to maintain ties with their homeland and be useful to it. That is why researchers also pay attention to strategies of agency among displaced academics, involving interaction with their societies of origin. Such strategies can appear even when there is no prospect of return – in particular through the preservation of intellectual heritage and the development of networks of contacts for the transfer of knowledge and cultural capital (Theo and Leung 2022).

A notable trend in the study of forced academic migration today is developing around the concept of 'third spaces', which denotes the sphere of micro-communities and grassroots initiatives of academics outside their home and host environments, in which displaced academics strive to continue research work in high-risk conditions (Axyonova *et al.* 2022: 22). The agency of academics in third spaces is based on a different model of overcoming foreignness: not through assimilation but through dialogue (Yuval-Davis 1997: 60). It is from this angle that researchers often look today, for instance, at the community of Turkish academics in Europe – as a group that contributes different critical perspectives provoking new discussions in the Western academic space. This includes, in particular, criticising authoritarianism and nationalism and challenging the precarity of the neoliberal system in Western academia, as well as creating alternative centres of knowledge production and support structures based on solidarity between academics in exile and their partners in host societies (Özdemir 2021; Özgür 2022). Incidentally, Özdemir believes that the categorisation of new forms of activism of displaced academics is in need of rethinking – in particular, she suggests that Turkish academics be recognised not as academic refugees but as the 'politically exiled', able to take part in critical discussions despite their legally uncertain situation (Özdemir 2021: 947).

Another form of 'third space' identified by researchers today is the professional activism of precarious academics and their networks, less result-oriented and more 'geared towards the formation and solidification of communities of mutual trust and solidarity' (Vatansever 2022b: 2). According to Aslı Vatansever, such affective forms and relational aspects of work and activism primarily represent a 'feminised' form of resistance and potentially expand the notion of the 'feminisation' of academic work (Vatansever 2022b: 4).

Thus, such new approaches to the study of the agency of displaced academics confirm the idea that individual and collective identities have a complex constructed nature and lie at the crossroads between self-representation and social categorisation (La Barbera 2015: 2). In addition, the exploration of agency as part of the study of forced academic migration not only pays tribute to the self-respect and dignity of academics but can also potentially influence policymakers by proposing alternative categories or by expanding already existing concepts.

The migration experience of Ukrainian academics is a case that illustrates the struggle of displaced academics for their subjecthood. However, it is also somewhat unique due to the specifics of the underlying military conflict and the situation and prospects of Ukrainian academics in Central and Western Europe. The majority of displaced Ukrainian academics are women, which is undoubtedly significant, considering the specifics of women's self-perception practices, inner conflicts and interpersonal relations in emigration (Ivashchenko and Kiselyova 2024). Furthermore, most Ukrainian academics find themselves in a more precarious position on the European academic labour market, since the share of those who have previously developed connections with Western academia, whether conducting research or holding long-term fellowships, is small. Moreover, the activism of Ukrainian academics in 'third spaces' focuses on speaking out about the war in Western academic institutions in order to shape its global understanding and promote political reactions at the international level. However, according to researchers, this leads to the self-labelling of Ukrainian academics as 'others' who are perceived less through their professional accomplishments than on the basis of their experience of war and trauma (Strelnyk and Shcherbyna 2023). On the other hand, these migrant researchers, most of whom intend to return to Ukraine, are increasingly categorised as 'academic losses' in the Ukrainian academic and political discourse, which marginalises the experience and skills they have acquired, as experience gaps widen between those who have left the country and those who have stayed. Thus, Ukrainian

academics find themselves at the crossroads of several discourses that marginalise and 'other' their subjecthood. All this makes the study of forms of Ukrainian academics' self-identification as a component of their agency and struggle for subjecthood a pressing concern. Our goal in this paper is to outline different forms of self-identification developed by displaced Ukrainian academics and to propose a typology of self-identities based on the different ways in which academics construct their autobiographical narratives.

Our analysis is based on the idea that identity is not a thing that people have and that causes them to act in a certain way but is, rather, an ongoing, open process of 'self-identification' linked to the agent's interests and built into the structure of his or her relationships (Jenkins 2008). We thus see the self-identification process itself as an agentic action.

It is methodologically important for our purposes to take into account the temporal orientation of the self-identification process. Following Hitlin and Elder Jr (2007: 171), we believe that the unfolding of this process directly depends on the 'time horizon' – the 'particular zone of temporal space' on which the actor's attention is focused and the perception of which is a reaction to the social situation in which the individual finds herself but, at the same time, is shaped by the individual's free will. As a result, several types of agency emerge. Two of them are relevant for our study. The first is pragmatic agency, which manifests itself in situations where habitual reactions to conventional social actions are invalidated by extraordinary circumstances (Hitlin and Elder 2007: 178), usually leading to a rupture of experience. The second is identity agency as a strategy for following habitual social roles and the habitual patterning of social behaviour, which both presuppose the perception of the continuity of one's own activities and the ability to plan for the future on this basis (Hitlin and Elder 2007: 179). In our case, by pragmatic agency we understand the social agency of interviewees, which covers all practices of 'taking part in the war', at the levels of both behaviour and emotion. By the identity agency of Ukrainian academics, we mean their professional academic activity and adherence to the academic ethos.

From a methodological standpoint, it is important to keep in mind that the typology of self-identities among Ukrainian academic migrants will represent a combination of the typology developed by the actors themselves and that constructed by researchers. Many of our interviewees, for instance, explicitly refuse to identify themselves as refugees or migrants and represent their leaving Ukraine as a form of academic mobility: 'I still reject, with regard to myself... the term "forced migrant" or "forced exile" or "refugee" [...] to me this is another academic leave' (ZSRO 31.08.2022).[2] Another example is: 'I have relatives living here, my father's brother, they are GERMAN, and... they also kept inviting me, but to JUST come, you know, as a refugee, I couldn't come like that, I... well, it's like I never inscribed myself in this role' (ZRBK 29.10.2022).[3]

Overall, we outline 3 types of self-identity of Ukrainian academics in emigration: 'mobile academics', 'refugee academics', and the transitional type of 'displaced academics' for those scholars who found themselves with the status of refugee but who see obtaining contracts and finding opportunities to engage in academic work as a change in status. The first two terms – 'mobile academics' and 'refugee academics' – can, to some extent, be regarded as existential concepts constructed by the interviewees themselves. In contrast, the term 'displaced scholars' is constructed by the authors. Following R. Papadopoulos, we understand it as a concept that emphasises the human experience of migration-related phenomena and perceives the forced nature of migration as a challenge, highlighting the agency of individuals fleeing war and other upheavals (Papadopoulos 2021: 38–43). First, we attempt to articulate the difference between 'mobile academics' and the other two categories, grouping the latter into the general category of 'academics fleeing from war' for the sake of convenience. Next, we try to pin down points of growth in the self-identification of 'displaced academics' through specific narrative strategies that manifest a change in their self-perception.

We must stress that our goal is not to determine the number or proportion of academics who exhibit this or that type of self-identification. This would be impossible, given the spread of our interviews over time and the

uncertainty of any classification. We aim to identify differences in the ways in which academic migrants describe their autobiographical experiences (what they say about those experiences and how they say it) and to describe the process of professional self-identification in forced migration as a dynamic phenomenon.

Method

The study is based on a body of semi-structured interviews with Ukrainian academics collected as part of the oral history project 'Moving West': Ukrainian Academics in Conditions of Forced Migration (2014–2024), which explores strategies of survival and career-building among Ukrainian humanities scholars of the first (2014) and second (2022) waves of migration caused by the Russian–Ukrainian war. In this article, we focus in particular on the experiences of those interviewees who have undergone forced migration to European countries after 24 February 2022. Of these, 43 semi-structured interviews are relevant for this purpose.

The Ukrainian interviewees represent 10 different regions and cities: Kyiv and its region (15), Kharkiv (15), Dnipro (3), Odesa (3), Lviv (2), Vinnytsia (1), Chernihiv (1), Mykolaiv (1), Mariupol (1) and Rivne (1). They are scattered across several European countries: Germany (18), Poland (13), Switzerland (4), France (2), Great Britain (2), Luxembourg (1), Sweden (1), Hungary (1) and the Czech Republic (1). Additionally, 5 of the interviewees had the experience of changing their country of temporary residence during the period under consideration.

Our interviewees primarily come from the humanities (mainly history but also ethnology, English philology, pedagogy and sociology). Most of them (38 individuals) are affiliated with institutions of higher education, while 3 work at research institutes of the Ukrainian Academy of Sciences, 1 is employed in a museum and 1 is an educator who organises educational and museum projects. In the project, 5 participants hold the degree of Doctor of Sciences (equivalent to Habilitation), 34 hold the Candidate of Sciences degree (equivalent to a PhD) and 4 are currently PhD students.

The gender imbalance among our Ukrainian interviewees (only 3 of 43 are male) is due to the fact that male academics under 60 cannot leave Ukraine, with a few exceptions.[4] Most of the interviewees (22) travelled abroad with their children – 1 with her grandson and daughter and 3 more with their elderly parents. Another 17 left the country with people who needed their care during migration. The presence or absence of dependent family members, to a great extent, determines the characteristics of interviewees' migration experiences and self-perception but it is not a decisive factor in the self-identification and construction of autobiographical narratives.

At the time of their interviews, most of the interviewees were on scholarship programmes lasting from 3 months to a year; only 6 did not have a scholarship. As a rule, the initial scholarships were short-term; during this time the host institutions helped Ukrainian academics to find further funding opportunities. Fourteen academics were granted scholar-at-risk scholarships while several others received research scholarships that were redirected to Ukrainian academics fleeing the war by European academic institutions in 2022. Four more persons held temporary work contracts with academic institutions in their host countries.

The interviewees had a range of relationships with institutions back in Ukraine. At the time of their interviews, most continued to work remotely or had arranged foreign leave, keeping their positions while they were abroad on scholarships. For 5 interviewees, leaving the country led to the termination of their temporary contracts and another 9 resigned during the active phase of the war for personal reasons or because of institutional demands to come back to Ukraine. It should be noted that 14 of our interviewees have already returned home. The ongoing war potentially carries the risk of job loss for Ukrainian academics due to faculty and staff layoffs and pay cuts in conditions, when the average salary of an associate professor in Ukraine amounts to 400 Euros and is not sufficient to meet basic needs.

Due to the traumatic nature of interviewing on this subject and the incompleteness of the events under study, it is important that our research adheres to certain ethical principles: voluntary and informed consent to participate in the project, academic integrity, respect for the rights and interests of the interviewees, recognition of the value of their experience and more (IASFM 2022; Wylegała 2022). To minimise the retraumatising effect of interviewing, we sought out interviewees using the 'snowball' method, which helps to establish a more trusting atmosphere during the interview process. This aspect was also taken into account when preparing the questionnaire. Our principal research tool was the semi-structured qualitative interview, which is based on a questionnaire but which also allows the interviewer to vary the number and sequence of questions and, if necessary, give the initiative to the interviewee. The main focus was on questions concerning the decision to leave the country and choice of destination, expectations and first encounters with reality, as well as reflections on further professional activity and, more generally, on the experience gained. At the initial stage of the project, we deliberately avoided direct questions about interviewees' long-term future, focusing on the discussion of academic migrants' immediate plans and emotional state. Interviewees sign a special agreement in which they choose the degree of public access to their interviews (from the widest possible use under their own name or anonymously to limited access to certain questions or to the interview as a whole), which they can subsequently change. Taking into account the prolongation of the war and possible risks to the interviewees, we currently do not publicise personal data for any of our project participants, which affects the way we cite interviews. However, despite all the difficulties inherent in the study of the extremely traumatic experience of forced migration, in our case the interviewing process is greatly facilitated by the professional background of the interviewees. Almost a third of them were involved in oral history research before the war or took part in such projects after leaving the country, so they are very familiar with the nature of our research and give meaningful consent to participate in it, taking into account the possible risks. In turn, the interviewers' own personal experience of migration also reduces the potential risks of retraumatisation.

We interpret the autobiographical experience of our interviewees using a method of narrative analysis which engages with stories about the experience of migration at the levels of both content and presentation, addressing the questions of what was said and how it was said (Barkhuizen 2014). We follow a performative approach, according to which narratives do not merely represent reality but participate in shaping it. According to Hanna Meretoja, narrative understanding functions by assimilating new situations to what is already known; it also works dialogically, as 'encountering new situations changes one's preconceptions and narrative models of sense-making' (Meretoja 2018: 91). Thus, the narrative represents not the outcome of an already established identity but a performative moment of meaning formation and a process of identity construction whose characteristics change depending on the context (Yarar and Karakaşoğlu 2022).

We attempt here to trace the manifestation of 3 types of self-identification ('mobile academics', 'refugee academics' and 'displaced academics') in the autobiographical narratives of Ukrainian scholars at 3 levels. The first level is the strategy of the representation of the content of the migration experience; here we focus on thematic analysis, while taking into account which interview questions give rise to which themes. Secondly, we consider the level of the metaphorisation of the migration experience. Following Lakoff and Johnson (1980), we see the metaphor not only as a result of the interpretation of reality (linguistic form) but also as a decision-making mechanism (conceptual structure), which, according to Steen (2008), also has a communicative function. On the third level, we analyse the emotives which are not just emotional markers that reflect experienced emotions but are also tools for directly changing, building, hiding and intensifying emotions, acting with varying degrees of success and generally influencing goal-setting (Reddy 2001).

Results

Strategies for representing the path to the West in interviews with Ukrainian academics

As already noted, some academics consciously reject the refugee identity (interviews PPEK 28.06.2022, ZRBK 29.10.2022, ZSRO 31.08.2022, ZTLK 10.06.2023, ZKWK 09.09.2023) or tell stories manifesting identity conflict – for example, in crossing state borders (ZKRK 04.08.2022). However, not all such interviewees can be classified as 'mobile academics'. Some belong to the group of 'displaced academics', since their self-identification emerges through rethinking their migration experience and their identity is more explicitly conflicted, for example:

> *I don't identify myself as a refugee, I understand that formally and, well, maybe that's why the name researcher-at-risk fellow but... and if many English people treat us like refugees, but what kind of refugee is this that every four yea- four months he reports what he did for his research, that's not quite a refugee in my opinion and again from the point of view of the Ukrainian law I'm not a refugee, I'm on leave, there you go. And... when I'm asked here, was asked once by an English woman whether I consider myself a refugee I say that no, I do not consider myself a refugee, I am here on the same stipend as the other fellows, I'm doing the same work as the other fellows, here* (ZPOK 15.12.2023).

The self-identification of 'mobile academics' is usually supported by certain ways of framing autobiographical experience and a whole network of metaphors that represent the behavioural strategies of academics abroad in terms of academic mobility. One such pattern is a self-conscious focus on a wide 'time horizon', embodied in the strategy of presenting one's experience not as a break but as a continuity of pre-migration and migration experiences in the form of a 'journey West' that began long before the war and migration (ZTLK 10.06.2023). In particular, such interviewees stress their professional background (ZTLK 10.06.2023) and previous exposure to international mobility: 'I was very happy that, back in the day, I had gotten this scholarship – Fulbright – and then I thought it would be good to get a Humboldt some day, too' (PPMK 19.08.2022). They also particularly notes the availability of professional communication networks that facilitated the wartime move abroad and provided a high level of help in adapting to a new country (ZSRO 31.08.2022); 'Everything was taken care of' (ZRBK 29.10.2022). For the interviewee whose words are quoted at length in the previous paragraph, the 'turning point' in making the decision to go abroad (where his long-time academic contacts were waiting for him) was his experience of domestic migration to Western Ukraine after the start of the full-scale invasion. He describes it as finding himself in a 'turbulent flow', a 'tunnel', which had no end in sight and which became 'part of this story' that brought him to one of the most renowned European universities. It is interesting that the interviewee articulated this theme when replying to the question about the meaning of his experience of migration, which we see as evidence of a reflection on identity, part of which is awareness of the importance of the continuity of experience: 'It was some kind of a turning point but, who knows, maybe in a few years all this will look different' (ZPOK 15.12.2023).

Another aspect of representing the autobiographical experience characteristic of interviewees whom we classified as 'mobile academics' was making a point that their decision was not just to evacuate from Ukraine but to leave with the goal of continuing academic work: 'And... then, then I simply made the decision for myself that, if I were to leave, I would not just go into nowhere but go to work. That is, do what I can, because this is ALSO important and also relevant' (ZSRO 31.08.2022).

...it was clear to me that if I still wanted to continue... to TEACH normally and... do something from a research point of view, then leaving a dangerous territory for a few months, it would probably be the best decision [...] I just said to myself right away, I don't know WHY I decided this, but I had to decide something in this respect, that I would NOT just GO, well, not knowing where (PEMK 22.08.2022).

This decision affected the level of organisation of the departure, among other things. 'Refugee academics' and 'displaced academics' in most cases used evacuation or personal transport or found a ride with someone else, referring to the entire undertaking as a 'classic evacuation' (ZSHD, 08.01.2024) or 'escape' (PDLR 17.06.2022). 'Mobile academics', on the other hand, despite the fact that they were also leaving in the first months of the war, planned their route and bought tickets, calling their departure from Ukraine a 'journey West' (ZTLK 10.06.2023), a 'path' they paved (ZSRO 31.08.2022) or even a 'voyage' (PEMK, 22.08.2022). It should be noted, however, that this aspect of our interviewees' experience was greatly influenced by the timing of their departure from Ukraine (the first weeks vs the first months of the full-scale invasion), as well as the geographical factor – from which part of Ukraine (eastern/western; under occupation/not under occupation) the interviewees left.

The most common metaphor characterising the move abroad in the narratives of Ukrainian academics is that of 'the road to nowhere'. 'Mobile academics' tend to apply it to others, while 'refugee academics' and sometimes 'displaced academics' use it fairly widely in speaking of their own experiences – pointing out, for example, issues with reception in the new country if they had an invitation and guarantees of a scholarship (ZNCK 05.11.2022) or, more often, in situations when they did not have a clear destination or invitation from European colleagues or acquaintances (PBWK 05.08.2022, ZRGK 20.06.2022). Notably, this metaphor not only conveys the subjective experiences and feelings of interviewees accustomed to planning all aspects of their lives but could also, at the communicative level, be used to appeal to European colleagues, reflecting the academics' expectations: '...and then when I was already on the train, I wrote to a colleague that, we had met in Kharkiv [...]. And purely by accident, I think of her, write and say, "So and so, I'm on my way to nowhere, to the West". She says, "Well, I'll help you, I know some people"' (PBWK, 05.08.2022).

Interviewees also gave different answers to the question of what crossing the Ukrainian border meant for them. As a rule, 'mobile academics' refused to assign any symbolic meaning to border crossing, considering it an ordinary event, one among many for them, including for academic purposes: 'I, well, there was nothing symbolic for me, I had, I only had the feeling of, God, how easy it, HAS BECOME' (PPMK 19.08.2022). For some interviewees, it was this question that prompted them to state their rejection of the refugee identity: 'So... there was nothing particularly symbolic that I was getting out of Ukraine, I was leaving Ukraine, so for me this was another academic trip. It's just that before it was a month, or two, three at most, and now it's a year' (ZSRO 31.08.2022).

However, for many 'academics fleeing from war', stories of crossing the border or approaching it presented an opportunity to talk about their strong emotional experiences. It is interesting that, for one interviewee, these experiences were related precisely to the conflict between the professional and the refugee identities:

Then as I remember very well, how we=our train arrived in Przemyśl. And we see the windows these volunteers start coming up, waving at us, and I'm just crying. To me, I had this feeling, you know, I had always gone to Poland for fellowships, for grants, for summer schools as a researcher, and here I am as a refugee with some kind of backpack, a small suitcase, with a child in my arms. Well, I know that a friend is already waiting for me there in Przemyśl [...] I understood that, like, I wouldn't be stranded at the station, but I, so much that, I cried... (ZZPD 30.06.2023).

However, more often interviewees talk in these stories about the feeling of guilt caused by parting with loved ones (ZNCK 05.11.2022, PDLR 17.06.2022) and the sense of betraying Ukraine and the Ukrainian people: 'I LEFT my people there' (ZPBL 15.08.2022), 'a GUILT complex, that you have, like, abandoned your fatherland' (ZVML 11.09.2022) and 'the FEELING, that I'm abandoning Ukraine, GUILT, reproach' (ZHBK 02.10.2022), often applying to themselves such derogatory markers as 'traitor' (PDLR 17.06.2022, ZVML 11.09.2022) or 'coward' (ZHBK 02.10.2022).

As a rule, 'mobile academics' do not display such feelings. In only one case did an interviewee mention the 'moral choice' that faced her as a 'patriotic person' (PPMK 19.08.2022). However, it is not just the statement of emotions and thoughts that is important but also how they are expressed. For instance, the last-mentioned interviewee uses, for this purpose, conceptual language such as 'the survivor complex' and her narrative functions less as a description of her emotions and more as an effort to manage them, to find circumstances justifying her decision.

Conversely, narratives of 'refugee academics' and 'displaced academics' are often dominated by strategies that represent their overall migration experience as traumatic. On the one hand, this is evident in the fact that interviewees, when answering the question about the meaning of their experience, draw attention to the emotional aspects ('mental conditions') that distinguish the experience of mobility from forced migration:

...many people from our diaspora believe that we are in COMFORTABLE conditions here, NOT LIKE... when they first arrived. But these are DIFFERENT mental conditions, different feelings… of a kind of hopelessness, tragedy (PKMK 22.08.2022).

I always sort of kept moving forward, and now I also just see, I in some way, I'm following this scenario, but... it is quite traumatic, it is an experience of moving forward, but in different conditions, in the conditions when... when there is suffering around you, when your country is on fire, and CRYING, you know, it's VERY hard (ZVML 11.09.2022).

On the other hand, some interviewees return several times to the theme of guilt when answering different kinds of question, describing in detail their emotions and thoughts: 'I would CHEW MYSELF OUT EVERY DAY, HARD' (ZVML 11.09.2022) and 'I couldn't do without sedatives, more or less' (ZHBK 02.10.2022). The use of this self-justification through a guilt and suffering strategy testifies to both the intensity of interviewees' emotional experiences and their authenticity. However, in terms of self-identification, it reflects the prevalence of pragmatic agency, the switching of interviewees' attention from their professional academic identity to a socially relevant one. A fairly large number of our interviewees indicated that they thought about the need to personally participate in the war – 'We got a request from the university who wanted to sign up for territorial defence; I signed up' (ZGLK 09.02.2023) – or 'physically' take part in the volunteer movement to support the war effort: 'Let's say helping to bandage the wounded, I very much considered this prospect for myself' (PPMK 19.08.2022). Thus, shame and guilt were caused by the inability to properly fulfil a valued social role (Owens and Goodney 2000) that came to the fore during the full-scale war.

At the same time, bringing up the feeling of guilt is often accompanied by representing the decision to leave Ukraine as an action taken under pressure from the family and made necessary by the obligation of care for loved ones (PDLR 17.06.2022, PKLK 16.04.2022): 'If it had concerned me PERSONALLY, of course NOT. I wouldn't have left, there's just no reason to. The CHILDREN, the children, it's this maternal instinct, you must get them set up somewhere […] and it was like a... like an excuse for me' (ZVML 11.09.2022). In this way, interviewees try to mitigate the effect of destructive emotions; however, as a result, giving up agency in the matter of motives behind leaving the country inevitably affects the construction of their autobiographical

narrative about the experience of migration as a whole: 'Like, even now I have this feeling that this is not at all=not=not my- my kind of behaviour, that it is not completely MY CHOICE, that it is, like, it is a bit imposed, sort of... by my FAMILY or something' (ZPBL 15.08.2022).

Also noteworthy is the difference in interviewees' representations of their expectations for the future as they were leaving Ukraine. For 'academics fleeing the war', regardless of whether colleagues and acquaintances were expecting them abroad, the future was characterised by 'unknowability' (PDLR 17.06.2022); they were experiencing 'the state of BEING LOST' (PKWK 05.08.2022), the fear of 'being stranded on the streets' (ZRGK 20.06.2022). The future looked as uncertain as it could be, which made it impossible to build a forward-looking strategy: 'I had no plans, I DID NOT PLAN' (PKLK 16.04.2022). Accordingly, interviewees testify that they were ready to work in other kinds of jobs (PKKD 18.06.2022, ZRGK 20.06.2022) and expected a break in their academic career:

So you'll have to stay, you think: well, physical labour, – yeah, you don't know the language, it is probably physical labour, well, I'm not afraid of any physical labour, right, but, still, I thought, that, there were no prospects, of continuing, the academic career... (PKLK 16.04.2022).

Alternatively, 'mobile academics', in their narratives, spoke of going abroad as the beginning of a new phase, a chance to continue academic work (PEMK 22.08.2022, PPMK 19.08.2022, ZRBK 29.10.2022). In this case, it may seem that a guaranteed scholarship abroad is the key factor in the self-identification of academics. Researchers have argued that the migration trajectories and possible success of highly skilled migrants in any migration movement are shaped by several factors, the central one being 'the way they enter a country: with a job offer or not' (Weinar and Klekowski von Koppenfels 2020: 3). However, as already noted, not all academics who had prior contracts and guarantees can be classified as 'mobile academics'. The key criterion here, we would like to stress once again, is the deliberate construction by interviewees of their own professional self-identity and its purposeful presentation in interviews.

We may highlight the importance of this thesis using the example of an interviewee who speaks of a deep internal conflict concerning the decision to leave Ukraine – which, she says, was made under pressure from her husband (PEMK 22.08.2022). Nevertheless, the description of the trajectory of her subsequent migration experience exhibits a certain sense of purpose. Thus, the interviewee decided to go, by invitation, to continue her work. She frames the story of the first weeks of adapting to a new country as that of struggle between apathy and professional obligations:

For the first maybe TEN DAYS, I wasn't I didn't WANT anything, I wanted to just sit and do nothing. [...] I HATED myself, why am I so WIMPY, why am I so WEAK, THIS IS NOT RIGHT, I have to ACT! THAT'S IT! LET'S GO, GET TO WORK and that's what I [laughs] *was saying to myself* (PEMK 22.08.2022).

Finally, the process of establishing contacts with European colleagues is presented as a conscious strategy on the part of the interviewee to change the nature of these relationships from humanitarian assistance to professional communication – 'intellectual care':

...if I had said, that I needed, well, I don't know, an iron... right, well, because I don't have one, I need, like, a blanket... because I'm cold or something. Well, they would have found all this for me, and... said, 'THIS IS IT, we have helped, a Ukrainian, right, everything is great, we, we have done something' [...] I had requests like, here, read my text, I want to present it, and can I, I don't know, I=me advi can you advise me I really want to, and can I ask you questions, and can you send me literature on this here subject... [...]

because I have come to whom, to intellectuals, well... what am I going to do, ask them for an iron? (PEMK 22.08.2022).

At the same time, the interviewee is aware of – and emphasises several times – the difference between her own strategy of behaviour and that of her Ukrainian colleagues at one of the largest universities in Europe. Thus, for example:

One of my [laughs] *colleagues there was complaining that at the Center, where SHE now was, they were saying that she should present something every month, she says: 'Oh my, every month, isn't that a bit much?' No, awesome... EVERY MONTH I would also like to do it every month'* (PEMK 22.08.2022).

Furthermore, our interviewee deliberately calls her internship a 'job' because this is what helps her to mobilise her strength and makes it easier to perform professional duties in extreme circumstances. Thus, once again, it is the ways of evaluating and representing one's professional activities that are key to the construction of identities in narratives of forced migration.

Strategies for representing professional activities during forced migration

Ukrainian scholars see the opportunities for academic work that have opened up for them, such as scholarships, grants or employment in European universities, in a variety of ways. Academics in the 'fleeing from war' category often perceive such opportunities as humanitarian aid (ZGBK 04.11.2022, PKLK 16.04.2022). Of course, any programmes for scholars at risk are primarily of a humanitarian nature; they are historically, socially and culturally determined and are directly related to the existing political regimes of migration (Löhr 2022: 81), of which participants on these programmes are certainly aware. However, it is important for us to concentrate on how our interlocutors represent the connection between the new prospects and their own experiences and what meaning they attribute to these professional opportunities.

'Academics fleeing from war' sometimes express their understanding of the humanitarian nature of the assistance through acknowledging that they lacked the necessary qualifications to compete for certain positions and opportunities:

To get this opportunity having right now the=the CV with the CV points that I have now is IMPOSSIBLE (ZHBK 02.10.2022).

I appreciate everything that I have received here... for me it is very unexpected, I never I mean somewhere in December [20]*21 I of course did not imagine that I would be HERE* [a well-known university in Germany] *[...] I... APPRECIATE it, because it... is absolutely at variance with my ideas about myself, about myself in academia* (ZUMK 08.09.2022).

Overall, the representation of social advancement as dependent on circumstances – rather than on one's own merits – and guilt towards those who are 'unlucky', are characteristic of the impostor syndrome (Mikrut and Łuczaj 2023), which occurs quite often among women who achieve success (Clance and Suzanne 1987) (note that 90 per cent of our interviewees are women). In the academic context, the concept of *habitus clivé* is more often used, which is designed to capture the psychological cost of academic mobility (Friedman 2016: 145). Research shows that, while in situations of gradual and limited mobility the *habitus* is equipped with resources to adapt to new social conditions, in cases of rapid mobility across the boundaries of the habitual

academic milieu, intended as long-term, the risk of painful mental sensations/emotional imprint increases (Friedman 2016: 139), which further impairs the condition of academics traumatised by war and uncertain future prospects.

This is why some of our interviewees represent their overall migration experience as traumatic. As already noted, this also affects academics' view of new professional opportunities. Thus, scholars 'fleeing from war' often interpret/evaluate the opportunity to continue their work first and foremost as psychological help, an avenue of escape from heavy thoughts and emotions:

Some TEMPORARY GRANTS, temporary PROGRAMMES... We started to frantically submit documents, again plunged into THIS kind of activity [...] and it, of course, took up all the free time remaining from... right... from a small child and so on, this, of course, HELPED, right, TO TUNE OUT, to not read the news (PKLK 16.04.2022).

Work does have a broad healing power and plays a critical role in the lives of those emerging from traumatic experience (Mollica 2006: 172). However, it is noteworthy that our interviewees particularly stress the importance of being busy – 'Well, work, work is always something that helps. I, I sit taking notes into the night until I just feel like I'm going to fall asleep over them' (ZGLK 09.02.2023) – rather than the significance of work as a way to find purpose and value. Also, sometimes the conditions that pushed our interviewees towards self-mobilisation are represented as external circumstances: 'This seminar, it... it put us back on our feet, you know' (ZVML 11.09.2022); 'One way or another someone invites you, with popular lectures […] Well, even if in=in=in a popularising format, they still get you back into academic work' (ZPBL 15.08.2022).

Some interviewees saw the opportunities for obtaining scholarships and contracts primarily as help from their European colleagues. They often characterised such colleagues as friends and sought to stress that their experience of close interaction took their relationship to a qualitatively new level of friendship or even something comparable to family ties: 'VERY WONDERFUL PEOPLE, I AM VERY GRATEFUL TO THEM for their support, they sincerely support Ukrainians, right, and I kind of always feel such, well, very powerful support and, you can always discuss the situation in Ukraine that is, you know, sort of FAMILY relations' (ZGAB 06.09.2023).

On the other hand, 'mobile academics', despite also seeing help from their European colleagues as 'invaluable support' (ZSRO 31.08.2022) that deepened their connection, still underscored the professional nature of such relationships: 'If I hadn't been SPECIFICALLY invited here, to the university, I would NOT HAVE LEFT... I have friends with whom... friends, acquaintances, colleagues, I don't even know what to call them, you could say PARTNERS, with whom we have been working together since 2010' (ZRBK 29.10.2022).

It must be said that the nature and level of assistance from European academics and academic institutions were important factors in the shaping of the self-perception of displaced Ukrainian scholars. As a rule, the latter were 'mobile academics' who found themselves in a milieu in which they received not only humanitarian but also professional aid and in which they were viewed as partners in the process of producing sound knowledge about Ukraine and the ongoing war. Moreover 'mobile academics' often made a point of highlighting their own agency in these relationships, noting that they not only received support from their European colleagues but also, in turn, helped the latter professionally (ZSRO 31.08.2022). It is important to note that some interviewees represented their success in European institutions, such as obtaining new grants, primarily as a result of their own actions and efforts:

I even see my colleagues who are like 'Will they keep us or not?' for example, at the institute [...] and it is not clear to me, the question of what it means, 'keep us' [...] I, like, well, I work and see the results probably

the colleagues who are around they also see this, and that's why they speak for you, because if you are moving, right, westward and... you're not interesting, well, they won't be writing on your behalf (ZTLK 10.06.2023).

At the same time, we should note once again that 'mobile academics' deliberately stressed the difference between their own situation and the experience of their Ukrainian colleagues working in the same European institutions. The category of 'Other' is an important aspect of a stable identity. Thus, on the one hand, 'identity agency' helped scholars to return to normal practices of academic competition, driven by professional interests: 'It is very clear that our people are not familiar with either literature or discourses or none, that is, maybe because they simply never had access to these materials [...] I'm saying that from a professional standpoint I would refuse [to extend scholarships], but they are not refused' (PPMK 19.08.2022). However, on the other hand, in the new situation, the resources and self-identification of 'mobile academics' pushed them to focus their efforts on organising help for their colleagues at home in obtaining academic opportunities and leaving Ukraine. In this, they acted as negotiators/intermediaries with their Western colleagues, which strengthened their symbolic capital (ZRBK 29.10.2022): 'That is, I was also able to... bring three more girls to the project. They already came, as it were, to a SET TABLE because we had already, they only needed their resumes because I took all this work upon myself' (ZTLK 10.06.2023). 'Mobile academics' also underscored their social agency – for example, by talking about their initiatives in organising the activities of the Ukrainian diaspora in general – and showed signs of possessing high psychological capital:

That is, the option when the environment formats me is not my option, rather I format my environment. Right, and the thesis 'It's good where we are', so, if I've ended up HERE, then I'll do my UTMOST here. Right, for my country, for my family, for and for myself (ZSRO 31.08.2022).

This mental stability and refusal to represent experience as traumatic can be explained by traits of personality; however, in our view, the difference in the perception of the future is also important. For all categories of interviewee, the future is as unpredictable as it can be during a war; nevertheless, all were willing to discuss the meaning of the migration experience for them, as well as ways in which it could be used in the future in their teaching and research. However, here 'mobile academics' were also distinguished from the other categories by a distinctive 'time horizon of the future' – namely the ability to focus attention on their period of migration/mobility as a temporal zone important in and of itself. For them, this period is not just a gap between the known past and the unpredictable future; it has a measurable value, expressed in concrete academic outcomes – usually writing books, completing doctoral theses (PEMK 22.08.2022, PPMK 19.08.2022), contributing to collective monographs (ZTLK 10.06.2023, ZSRO 31.08.2022) or editing collections of sources:

Integration, integration I'm not integrating into this SYSTEM, but... I want to DO SOME WORK, I want to take MORE... what I CAN take now, right, of the same, like I said, of the same SOURCES, of the stuff that later it will be possible to work with back home, with that material (ZRBK 29.10.2022).

Thus, the drive of 'mobile academics' to articulate a professional identity distinguishes them from other academics, whom we have grouped into the category of 'fleeing from war'. However, most interviewees in the latter group show signs of leaving the refugee identity behind; they can often be classified as 'displaced academics'. Such signs vary depending on the timing of the interview (for example, during the search for grants) or circumstances of migration (for example, migration from areas of intense strikes or shelling or the

experience of migration burdened with care for family and children). In the latter case, interviewees often spoke about a conflict between professional and family responsibilities when, faced with professional prospects, they could not fully meet their own idea of professionalism due to the need to care for loved ones (ZVML 11.09.2022, PKMK 22.08.2022, ZPBL 15.08.2022). It is interesting that some 'mobile academics' represented their children as 'partners' (PEMK 22.08.2022) and allies in taking advantage of the opportunities opening up in the course of migration (PPMK 19.08.2022, ZSRO 31.08.2022).

Despite the diversity of experiences of 'academics fleeing from war', however, we can detect signs indicating a departure from the refugee identity. First and foremost, many interviewees rejected the identity of a victim and distinguished themselves from other categories of refugees. The emphasis here was placed not so much on the fact that academics received additional opportunities abroad but on their eagerness to continue academic work: 'But now I am seeing... completely different situations, when people si- for 3–4 months they sit and do nothing, just sleep [...]. We had COMPLETELY DIFFERENT, a different vision of our stay here' (ZRGK 20.06.2022); 'I will try to do my BEST to work HARD, to do everything in my power' (PPEK 28.06.2022).

Also inextricably linked with the rejection of the victim identity is interviewees' stated intent to independently solve problems arising during migration (ZKRK 05.10.2022, PKWK 05.08.2022), as well as their efforts to build relationships of equality with colleagues who helped them:

That is, I do not have a feeling that... I... owe something or that I am treated with some kind of, like, sa-, not sadness, but with some kind of... [Int. – pity]. Yes, that is, I am treated as an... EQUAL, right. And, uh, and this helps me, for example, we were invited to dinner, and this Friday we are having Geraldine and her husband over for dinner (ZKRK 05.10.2022).

The change in self-identification is also evident in the fact that interviewees not only describe their mental experiences – in particular the feeling of guilt – but also reflect on how they cope with such emotions. In so doing, social obligations connected with one's participation in the war effort are framed in terms of the pressing awareness of professional responsibilities:

She managed to realise my dream of joining the territorial defence she says, 'Well, all right, I joined the territorial defence, got registered there, I went there for a month, and then they told me 'That's it, go home, we don't need you here, we, like, need professionals'. That is, she, so to speak, gave me to understand that everyone should do their job. That is, yes, I don't have, like, combat experience, but I have the experience of teaching, I can do that (ZGLK 09.02.2023).

In fact, the most common metaphor interviewees use to represent their activities during the war is that of fighting on the 'information front' (ZVML 11.09.2022, ZHBK 02.10.2022, ZRGK 20.06.2022): 'Everyone on their front must do everything in order for us to win as soon as possible. And-and I believe that our work, and for us it is information work, that this information front plays a very important role' (ZMLM 31.10.2022). The professional activities of academics assume the character of a twofold mission – to disseminate information about the Russian–Ukrainian war and to represent the Ukrainian academic community abroad through one's work:

...those people who will now work in Europe, with their reputation they also cement the reputation of Ukraine and create the reputation of Ukraine. And if before, European institutions, well, were afraid somewhat, yes, let's say, to collaborate with Ukrainian institutions, now they will not be afraid of it, because

they will see, well, that our people are also highly professional, reliable and hardworking and this is now kind of like our, our mission today for those who are in Europe from the academic community, it's... to uphold and create Ukraine's reputation here, so that they keep working with us going forward (ZKPC 27.07.2022).

This vision was not only declarative. It was also expressed in concrete decisions and choices – for instance, the decision to write and publish in European languages, which would potentially 'make Ukraine better heard, internationally' (ZPOK 15.12.2023). The willingness of our interviewees to reflect on the use of their traumatic experience of migration in research can also be seen as a sign of professional growth. Thus, some interviewees stated that their experience helped them to better understand the behaviour of historical actors caught up in tragic events of the past (PILK 18.04.2022, PKLK 16.04.2022, PKMK 22.08.2022). The willingness to incorporate reflection and a search for the meaning of the migration experience into one's current and future activities is an important sign of post-traumatic growth (Kraybill 2019).

Thus, the overwhelming majority of academic participants in our project show signs, in their interviews, of the actualisation of their professional self-identification, which allows us to classify them as 'displaced academics'. We propose this term as a way to highlight the fluid nature of the forced migrant identity of academics and the potential of professional values and commitments as drivers of change in their identity.

Those who spoke of themselves more as refugees were usually those who did not have the opportunity to obtain scholarships and contracts in European academic institutions (PKKD 18.06.2022, ZPBL 15.08.2022, ZSHD 08.01.2024, ZGBK 04.11.2022) or (like one interviewee) who found employment in a different field (PDLR 17.06.2022). In such cases, it is external factors, more than the narrator's intention, that influence the representation of the migration experience. Nevertheless, it is important to show the impact of migration on the self-identification of this group as well. Thus, several interviewees stated their decision to return to Ukraine but, at the same time, spoke about plans to apply for grant programmes (ZGBK 04.11.2022, ZPBL 15.08.2022). Another interlocutor, interviewed after her return to Ukraine, noted that access to European libraries allowed her to formulate a new topic that she was now working on internationally:

...and when I came to [Central European country] *for the second time this summer, I had this bag, with the Ukrainian colours like a flag, this image of a girl on it. And I went around with this bag, always, and I sometimes caught people looking at me in different ways, I just felt it but I was like like all confident, that I'm not leeching, pardon me, on your taxes I'm here doing research work, earning a living. I came on my own have done work on my own and will go home on my own* (ZSHD 08.01.2024).

Conclusion

The proposed typology of the self-identification of Ukrainian academic migrants, as represented in their interviews through specific narrative strategies, demonstrates the dynamic nature of the self-identification process. We believe that our article provides strong support for recognising the process of the self-identification of academics as a special and important form of their agency. We draw attention to the fact that it is not enough to register the rejection of the 'refugee' identity at the level of a narrator's self-labelling. Self-identification is a complex and continuous process of autobiographical storytelling by displaced academics in which they rework their migration experience which, in turn, leads to certain decisions and actions. This process demands significant effort, unfolding as it does in conditions of uncertainty and vulnerability and amid a multiplicity of marginalising discourses.

Furthermore, our paper underscores the key importance of professional agency for displaced academics. In wartime conditions, Ukrainian academics are faced with a value conflict between civic duty and self-preservation (and the preservation of loved ones). The experience of migration pushes them to re-imagine their pragmatic agency, which becomes part of their professional identity. Moreover, professional identity serves as an important instrument of post-traumatic growth and resilience for displaced Ukrainian academics.

First, our interviewees' reflected-upon experiences of mobility become a resource for them, creating (but not necessarily guaranteeing) the opportunity to construct a more consistent academic identity in difficult conditions. Second, professional activity serves as an important 'anchor' (on this term, see Grzymala-Kazlowska and Ryan 2022) for Ukrainian academic migrants, allowing them to emotionally and cognitively cope with negative feelings, maintain relative social and mental stability and function effectively in the new environment. As a result, the replacement of their 'refugee' identity with the identity of a 'displaced academic' occurs hand-in-hand with the growth of the perceived social significance of their professional activities (taking on the quality of a mission) and redefinition of their professional responsibilities. Finally, the experience of migration in and of itself usually helps academics to become more resilient. Thus, even interviews with 'refugee academics' who did not take advantage of professional opportunities during their forced migration show the influence of their experience on their subsequent professional mobilisation and on the development of positive ideas about their own strengths and capabilities. So, professional identity rooted in academic values potentially becomes the basis for the psychological integration of the experience of displaced Ukrainian academics, adding to the sense of coherence of this experience.

Our study also has implications for the conceptual and terminological apparatus of the study of forced academic migration. By highlighting the dynamic nature of the process of self-identification of Ukrainian academics, centred on their professional identity, we hope to contribute to Papadopoulos' (2021) concept of 'displacement' as an alternative to 'forced migration', shifting the emphasis from the external stimuli and circumstances of migration to the feelings and reactions of displaced persons and their reflexive work on their own life experience.

It is also important to stress that, for some Ukrainian academics, rejection of the identity of a 'refugee' or 'migrant' is conceptually linked to the notion of 'academic mobility'. On the one hand, this concept is grounded in the interviewees' previous experience; on the other, it sets a certain horizon of expectations for the future – to return home and apply the acquired experience in the field of research and education in Ukraine. This is where the unique value potential of this category lies. However, the agency of Ukrainian academics comes into conflict with the discourse of 'academic losses', widespread in Ukraine, which perceives migrant academics as an anonymous and homogeneous group, marginalising them and ignoring the competencies and experience which they have gained abroad. We see the practical significance of our analysis in bringing to the fore the need to acknowledge this experience and integrate it into the national academic and social context.

Furthermore, our goal is to draw attention particularly to the reflexive work of academics on self-identification. It is at the level of identity construction that both codified knowledge and 'tacit knowledge', accumulating through socialisation and professional growth in a given community, are acquired and transmitted. The experience of academics thus requires further study and should become the subject of academic and public discussion.

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Notes

1. Article 12. Council Directive 2001/55/EC of 20 July 2001, https://eur-lex.europa.eu/eli/dir/2001/55/oj/eng.
2. The names of interviewees are encoded as follows: the first letter indicates the form of recording (via Zoom or in person), the second letter represents the surname code (the first letter of the interviewee's last name), the third letter denotes place of residence abroad, and the fourth letter corresponds to place of residence in Ukraine.
3. In order to bring the spoken and written language as close together as possible, our transcription marks all exclamations and hesitations by the interviewee, short (comma) and long (full stop and ellipsis) pauses, emphasis on certain words and phrases (capital letters), quick combinations of words (equals sign), stumbles (fragment of a word followed by a hyphen, for instance si- sit), illegible fragments that cannot be deciphered and abbreviations (ellipsis in square brackets) and the interviewee's behaviour and reactions to the questions (laughter, excitement, embarrassment, etc.)
4. All interviewees are correctly gendered in the article. For male respondents, we used the pronoun 'he' and for female respondents, we used 'she'.

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Enhancing the Relative Acculturation Extended Model: A Qualitative Perspective

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Drawing upon insights from 2 empirical qualitative studies conducted within the framework of the Relative Acculturation Extended Model (RAEM), this paper proposes modifications to the model to better suit qualitative research inquiries into migrant acculturation experiences. Firstly, it highlights the interconnectedness of various psychosocial domains in migrants' lives. Secondly, it challenges the distinction between public and private domains embedded in the model, arguing instead for an approach that recognises the dual nature of each domain, encompassing both public and private aspects. Thirdly, the authors suggest integrating values as transversal elements present across all domains, rather than treating them as a separate domain. These 3 specific modifications allow for a more nuanced understanding of acculturation processes, enabling researchers to capture the complexity of migrants' experiences more comprehensively than the original version of the model. By emphasising flexibility and adaptability, the enhanced RAEM provides a useful framework for qualitative investigations into acculturation phenomena, facilitating deeper insights into the lived realities of migrant populations.

Keywords: acculturation, qualitative research, Relative Acculturation Extended Model

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Introduction

This article focuses on the Relative Acculturation Extended Model (RAEM), which has primarily been utilised in quantitative research on the acculturation process of migrants in Spain (Cuadrado, García-Ael, Molero, Recio and Pérez-Garín 2021; López-Rodríguez, Bottura, Navas and Mancini 2014; Navas, García, Rojas, Pumares and Cuadrado 2006; Navas, García, Sánchez, Rojas, Pumares and Fernández 2005; Navas, Pumares, Sánchez, García, Rojas, Cuadrado, Asensio and Fernández 2004; Navas and Rojas 2010; Navas, Rojas, García and Pumares 2007; Rojas, Navas, Sayans-Jiménez and Cuadrado 2014) and Italy (Mancini and Bottura 2014). Our objective is to propose modifications to the model's structure based on the results of our 2 empirical research projects, aiming to facilitate its application in qualitative research. Initially, we provide an introduction describing definitions of immigration, acculturation and dual identity and a succinct overview of the original model. Subsequently, we outline the research supporting our proposed modifications. In the main body of the paper, we delineate potential adjustments pertaining to the model's structure. We challenge the rigid categorisation into central and peripheral (private and public) domains, advocating instead for integrating both public and private aspects of acculturation experiences within each RAEM domain. Within the domains themselves, we scrutinise their separability and question the relevance of delineating the values domain as distinct.

Our paper represents the inaugural endeavour to comprehensively adapt a model widely utilised in quantitative acculturation research for application within a qualitative paradigm. Furthermore, it constitutes an effort grounded in empirical research, affirming the efficacy of the modified RAEM as a qualitative research tool and analytical framework.

Theoretical background

Acculturation in the context of global migration

One of the great social challenges of the 21st century is undoubtedly the international migratory movement and the impact it produces on both migrants and the societies that receive them. Although migrations have always occurred and have been key to the development and evolution of human beings, never before in the history of mankind has there been a period in which so many people have lived outside their countries of origin. This number was estimated to be 281 million in 2020 (3.6 per cent of the world population; McAuliffe and Triandafyllidou 2021). These movements have a major impact on different areas (e.g., political, economic, social, psychological) of the lives of displaced persons and of the societies in which they arrive, generating great diversity (ethnic, cultural, religious, etc.) but also enormous challenges of adaptation and mutual adjustment that can lead to problematic or conflictive intergroup relations.

One of the most important lines of psychosocial research in the field of migration has been the study of the acculturation and identification processes experienced by migrants and the relationship these processes have with their adaptation in receiving societies (for a review, see, e.g., Brown and Zagefka 2011; Sam and Berry 2016; Schwartz and Unger 2017).

Acculturation refers to the process of cultural transformations that occur when 2 or more culturally distinct groups come into contact. This is the classic definition provided by Social Anthropology and Sociology, the first disciplines to address this process in the North American context (see, e.g., the definition by Redfield, Linton and Herskovits 1936). However, acculturation also refers to the changes experienced by individuals ('psychological acculturation') in cognitive, affective and behavioural aspects (e.g., attitudes, values, behaviours and identity), as a consequence of continuous and direct contact with people from diverse cultures

(Berry 1997; Graves 1967). The way in which the acculturation process is resolved will have important consequences on the adaptation (psychological and sociocultural) of people to their own culture (Searle and Ward 1990; Ward and Kennedy 1993).

The literature has shown that the acculturation process involves all groups in contact; it is a reciprocal process, with consequences for all parties. All groups in contact change the minorities and majorities that make up the host societies (Berry 1997; Bourhis, Moïse, Perreault and Senécal 1997), although these changes occur more intensely in the arriving minorities. Often, migrants are not completely free to choose how to resolve the acculturation process, because they are largely dependent on the attitudes that receiving societies have towards them and the immigration policies that are implemented (Sam and Berry 2010). Receiving societies and their contexts (social, political, economic, etc.) play a fundamental role in these processes, facilitating or hindering certain forms of acculturation and, therefore, of the adaptation of migrants (Berry 2023).

In contrast to the first unidimensional models (e.g., Gordon 1964), current psychological acculturation models (e.g., Berry 1997; Bourhis *et al.* 1997; Navas *et al.* 2005) consider 2 independent attitudinal dimensions on which migrants and the host society can stand: a dimension of maintaining the culture of origin (To what extent do I consider it important and valuable to maintain my culture of origin or my identity in this new society?) and a dimension of adopting the host culture (To what extent do I consider it important and valuable to adopt elements of the host culture?). The combination of these 2 dimensions gives rise to 4 ways of resolving the acculturation process and 4 options (strategies/preferences) of acculturation: integration, assimilation, separation and marginalisation.

Different identities (e.g., ethnic, cultural, ethnocultural, national, religious) constitute central aspects in the process and definitions of acculturation (Phinney and Alipuria 1990, Phinney, Horenczyk, Liebkind and Vedder 2001). According to Social Identity Theory (Tajfel and Turner 1979), social identity is the sense of self that people derive from their membership in social groups. Specifically, a person's social identity includes 'knowledge of his or her membership in a social group (or groups), together with the valuational and emotional meaning associated with that membership' (Tajfel 1984: 292). The formation and maintenance of a positive social identity is crucial to the development of a positive self-concept and self-esteem and shapes how individuals perceive themselves and interact within social groups.

Based on this definition, ethnic identity refers to the sense of belonging to a particular ethnic group. It can encompass several aspects such as self-identification, feelings of belonging and commitment to the group, as well as shared values and attitudes towards one's own ethnic group (Liebkind, Mähönen, Varjonen and Jasinskaja-Lahti 2018). Another essential part of the social identity of people settling in a new host society is national identity, defined as self-categorisation and emotional attachment towards the national majority or host society (Liebkind *et al.* 2018). In the psychosocial literature, ethnic and national identity are used as an operationalisation of cultural identity, especially when analysing populations of children and youth with immigrant backgrounds (Maehler, Daikeler, Ramos, Husson and Nguyen 2021). Both identities are considered independent of each other. That is, individuals can identify with their ethnocultural group (ethnic identity) and with the host country – or the country in which they grew up (national identity) – without involving any conceptual or empirical contradiction (Berry and Sabatier 2010; Zhang, Verkuyten and Weesie 2018). When people are strongly identified with both groups (ethnic and national), the literature points out that they present a dual, bicultural, multicultural or integrated identity (Fleischmann and Verkuyten 2016; Maehler *et al.* 2021; Phinney 2003). Ethnic and national identity, together with acculturation strategies and preferences, are key variables for understanding, from an intergroup perspective, how people of immigrant origin and those of the host society manage coexistence with diverse cultural groups.

About the Relative Acculturation Extended Model (RAEM)

The Relative Acculturation Extended Model (RAEM – Navas *et al.* 2004) originated from the University of Almeria, situated in the ethnically diverse province in southern Spain. Its development aimed to enhance the understanding of intergroup relations within the province, with the ultimate goal of designing tailored social interventions for the local community (Navas and Rojas 2010). The RAEM posits that migrants may adopt multiple acculturation orientations simultaneously across various domains of life (as defined in Berry's model (1997): integration, separation, assimilation and marginalisation). These are known as domains of acculturation, including in peripheral (also referred to as public) areas: political, social welfare, work and economy; in central (also referred as private) areas: social relations, family relations, religion and values for adults; and in the case of adolescents in peripheral areas – school and the economy – and in central areas such as social relations, family relations, religion and values (López-Rodríguez *et al.* 2014; Mancini and Bottura 2014).
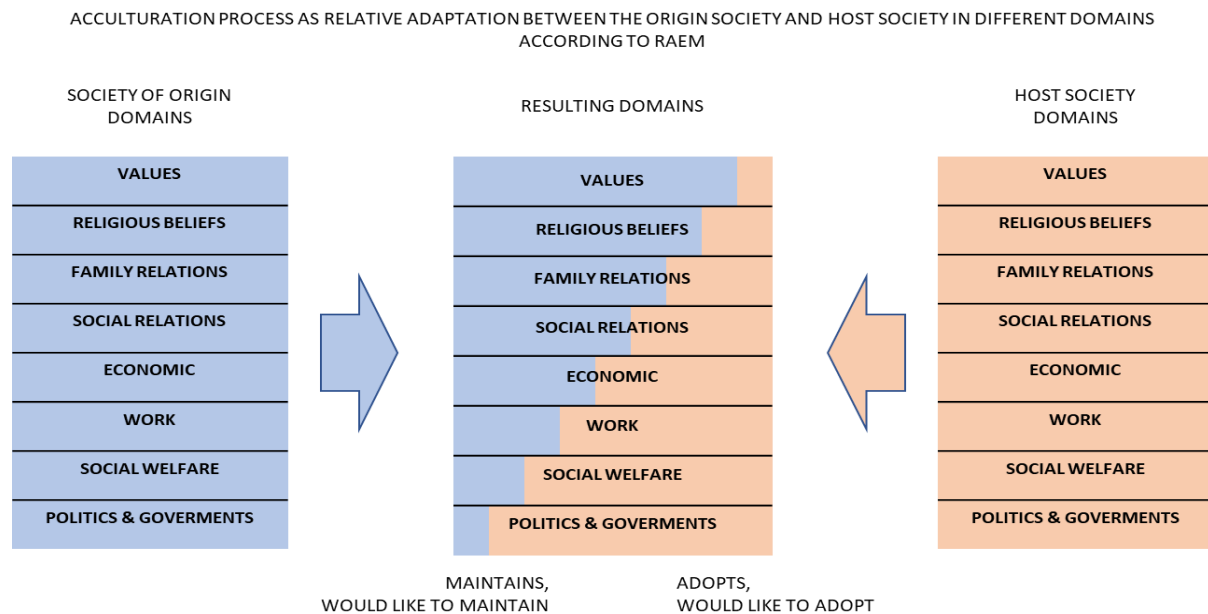
Research on the acculturation process, including studies utilising RAEM, consistently demonstrates that the extent of adoption of the majority culture is more pronounced in public domains, such as the realm of employment. Conversely, in private domains, such as family dynamics, a greater retention of the culture of the country of origin is often observed (Arends-Tóth and van de Vijver 2004; Birman and Simon 2014; Rojas *et al.,* 2014). Additionally, migrants' acculturation orientations are situated within 2 dimensions: the real plane and the ideal plane. The real plane signifies the orientations actually manifested by migrants. In contrast, the ideal plane represents the orientations preferred by migrants, reflecting what they would ideally like to achieve under optimal conditions. Similarly, concerning the host society, a distinction can be made between the real plane – comprising the orientations perceived by the host society as actually being realised by migrants – and the ideal plane, representing the preferences regarding the orientations that migrants should ideally adopt. In both the newcomer group and the host society, these 2 dimensions may align or exhibit significant disparities.

Acculturation is not viewed as a unilateral process; rather, it entails changes not only in migrants' cultural patterns but also in those of the host society. The RAEM, akin to other models (Bourhis *et al.* 1997), acknowledges the diverse intergroup relations that emerge from the intersection between the preferences of the host society towards the acculturation orientation of migrants and the actual orientations put in practice or preferred by migrants – whether they be consensual, problematic or conflictual.

Research conducted utilising the model should acknowledge the ethnic and cultural diversity within migrant groups and consider the various psychosocial factors external to the model. These factors may include in-group bias, identification with one's own group, perceived cultural enrichment, stereotypes and prejudices against specific groups, perceived similarities, intra- and intergroup differentiation, intergroup contact and collectivism (Navas *et al.* 2005, 2007).

The features of the model discussed above can also be observed in Figure 1, which shows the acculturation process in a simplified but clear way, as captured by the Relative Acculturation Extended Model envisioned by its creators. Such a nuanced approach renders the model valuable for research conducted across disciplines and research paradigms. However, it is worth noting that not all of the aforementioned assumptions are fully integrated into the model in the most optimal manner for qualitative research purposes.

Our choice of the Relative Acculturation Extended Model (RAEM) was not incidental. RAEM is one of the most widely used extensions of Berry's classical acculturation model (see Sam 2024), making it a well-established framework within acculturation studies. While Berry's model provides a foundational understanding of acculturation strategies, RAEM offers a more nuanced perspective which allows for a more context-sensitive analysis of acculturative processes. This added complexity makes it a strong starting point for adaptation to qualitative research, where a more flexible and dynamic approach to acculturation is needed.

Figure 1. Relative Acculturation Extended Model

ACCULTURATION PROCESS AS RELATIVE ADAPTATION BETWEEN THE ORIGIN SOCIETY AND HOST SOCIETY IN DIFFERENT DOMAINS ACCORDING TO RAEM

Source: Own elaboration based on Navas and Rojas (2010).

Note: The middle column shows the effect of the acculturation process of migrants in various spheres of life. The blue colour represents the extent to which migrants maintain their culture of origin and the orange colour represents the extent to which migrants adopt the culture of the country of emigration in each sphere of life described in the RAEM.

Research using the RAEM

Studies utilising this model with migrant and native people have predominantly employed the RAEM questionnaire (Cuadrado, García-Ael, Molero, Recio and Pérez-Garín 2021; López-Rodríguez *et al*. 2014; Navas and Rojas 2010; Navas *et al.* 2004). The survey's migrant respondents, through a self-reported scale, assess the degree to which they maintain their own culture within each acculturation domain (e.g., political, social welfare, work, economy, social relations, family relations, religion and values) and the extent to which they adopt the culture of the host country. This assessment is typically conducted using a 5-point scale, where 1 signifies 'none' and 5 signifies 'very much'.

Respondents do not provide information pertaining to the specific experiences (behaviours, motivations, attitudes, emotions) constituting acculturation within a particular domain. Instead, they offer a general assessment of their status within those domains. Consequently, migrants may only report actions and beliefs of which they are aware or those which they consciously choose to disclose to the interviewer. Moreover, it is contentious to assume that the acculturation process is entirely transparent to the migrant and that s/he possesses comprehensive self-awareness regarding its course. Setting aside considerations of the self-awareness of desires and motivations, it is important to recognise that individuals may not have a complete understanding of their own behaviour, especially when quantifying it. For instance, migrants may not have full awareness of the structure of their social circles or the proportion of language they use in daily activities. Ultimately, quantitative research utilising both the RAEM and other models like Berry's orthogonal one (Berry 1990), does not elucidate the specific set of behaviours and experiences which a participant has in mind when assessing each domain.

However, it is noteworthy that the authors of the RAEM (Navas *et al.* 2004) also employed qualitative methodology during the model testing phase and in a few subsequent research endeavours. The study with

survey methodology (Navas *et al.* 2004) was complemented by focus-group and narrative-biographical interviews, which were subsequently analysed, among other approaches, utilising a theoretical framework grounded in the RAEM.

The utilisation of qualitative methodology in research conducted by Pumares, Navas and Sánchez (2007) facilitated the exploration of topics pertinent to the acculturation process that are prioritised by representatives of diverse social institutions working with immigrants in Almería, as well as their perceptions of the most pressing issues. It also enabled the identification of native expectations regarding strategies put in practice for migrants within specific domains of acculturation. Additionally, the results of qualitative analyses from another project indicate that immigrant families employ a variety of acculturation orientations and that there exist conflicting expectations between the home and social environments regarding the acculturation strategies undertaken by immigrant children (Navas and Rojas 2019).

There are limited studies that scrutinise the RAEM within the realm of qualitative analysis. Barbara Thelamour's studies (Thelamour 2017; Thelamour and Mwangi 2021) investigating the perceptions and preferences of hosts (Americans of American descent) towards acculturation strategies undertaken by immigrants from Africa (of non-American descent) employed both quantitative and qualitative methodologies. Thelamour's approach allowed participants to articulate their thoughts on the acculturation of African immigrants and to define Black American culture, thereby elucidating differences in acculturation resulting from participants' conceptualisations of their host culture. It is noteworthy that Thelamour utilised definitions of life domains different from those in the original RAEM, tailored to her research group. Additionally, she highlights the necessity for more-targeted qualitative questions based on the RAEM to validate survey responses. Monika Ben-Mrad (2018) conducted qualitative research, utilising this model, with Turkish residents of Polish descent. The findings of her study reveal that, among the group of Polish expatriates living in Istanbul, respondents frequently discuss strategies associated with assimilating into the new culture in the public domain, while maintaining aspects of their own culture in the private domain. However, the authors of the aforementioned research did not prioritise describing the resultant reflections on the model itself.

Description of the studies from which the model modifications are derived

Our reflections on the Relative Acculturation Extended Model stem from our own research experience in conducting qualitative studies using this framework. In the next section, we provide a succinct overview of the qualitative research strategy employed in each of our studies, along with the methods utilised for data collection and analysis.

Study 1. Conducted with children and their parents of Polish origin residing in Spain (principal investigator: Paulina Szydłowska-Klakla)

The study employed a qualitative research approach utilising a field research strategy, which encompassed observations and multiple case studies (Yin 2018). Each case study focused on a parent-child pair of Polish origin residing in Spain, with a total of 21 cases examined. Data collection involved semi-structured interviews conducted separately with both the children and their parents. For the children, additional visual methods such as pictures and drawings were utilised. The collected data underwent analysis using the template analysis method (King 2012; Langdridge 2007). Template analysis, rooted in interpretative-phenomenological analysis, is a method commonly employed in qualitative psychological research to explore experiences (Smith 2017), with a stronger emphasis on referencing existing theoretical knowledge (Brooks, McCluskey, Turley and King 2015). Both the interview guides and the analysis template were constructed based on the RAEM framework.

The coding process was conducted in MAXQDA using an initial template based on the RAEM, which included a predefined set of codes. As the analysis progressed, new codes emerged reflecting participants' life experiences and were organised into broader categories such as 'grief', 'discrimination' or 'ethnic identity'. This dual approach enabled the identification of behaviours and experiences linked to acculturation orientations. At the same time, it allowed for the discovery of new codes related to key life circumstances related to acculturation. These emerging themes, tied to participants' developmental contexts and goals, provided a deeper understanding of the acculturation process beyond the original framework of the model. Reflecting on the research process, the main researcher recognised the value of her fluency in Spanish and her 16-month stay in Spain. These factors were crucial for data interpretation and interviews, as many children preferred speaking Spanish over Polish and the parents Polish over Spanish.

Study 2. Focusing on legal and institutional factors in the acculturation process of Slavic migrants in Poland (principal investigator: Jan Bazyli Klakla)

The second empirical research study, serving as the foundation for this work, involved conducting 5 expert interviews with migration professionals and 15 biographical-narrative interviews with migrants from European Slavic countries who arrived in Poland between 1989 and 2010. In the analysis, the Template Analysis method (King 2012; Langdridge 2007), biographical analysis (Schütze 2012) and the formal-dogmatic method were employed. Like Study 1, the interview guides and initial analysis templates were structured based on the RAEM framework. The data collected during the empirical research were organised according to identified themes such as citizenship, the labour market, street-level bureaucracy, education, discrimination, healthcare and Polish ancestry (for the full study, see Klakla 2024).

The reflection on the model and the process of developing its modifications followed a similar trajectory in both studies. The original version of the RAEM served as a starting point, guiding the research design, the development of research tools and the initial stages of analysis. However, as the qualitative analysis deepened, certain aspects of the model appeared less compatible with the nuanced nature of qualitative inquiry. This led to proposals for modifications aimed at increasing the model's flexibility and applicability. In Study 2, the revised model was then tested against the collected data, allowing for further refinement. Through this iterative process, we arrived at the version of the RAEM presented in this article. Both research projects were conducted in parallel at the same university, with continuous exchange and consultation between the authors. Experts from the Centre for Migration Studies in Almería were consulted during that process, ensuring a rigorous and reflective approach to model development.

Ethical considerations

Both studies complied with ethical guidelines for psychological research (American Psychological Association 2017). Participants were informed about the study's purpose, data anonymisation and their right to withdraw at any time. Adult participants provided written or verbal informed consent for their own participation and, in Study 1, for their child's involvement, including the recording and transcription of interviews. Additionally, in Study 1, children gave verbal consent, while adolescents over 16 signed written consent forms.

Results – proposed modifications

As a result of the aforementioned studies, two sets of recommendations for potential modifications of the RAEM for qualitative research have emerged: recommendations on model content and recommendations on

model structure. Model-content modifications pertain to the definition of culture used in the model and the influence of life circumstances and psychosocial context on the acculturation process. Model-structure modifications involve model assumptions and its construction. These proposals are grounded in the conclusions drawn from the data analysis process in both research projects. Therefore, they should be viewed as sources of inspiration rather than rigid modifications, as the contextual conditions and life circumstances may vary between different study groups. In this text, we present proposals concerning elements of the model structure, which stem from significant aspects related to the participants' experiences of acculturation. We substantiate our proposals with examples of statements made by the respondents.

It is important to note that applying the model to research involving different migrant groups or in diverse cultural contexts may yield new insights and perspectives.

Overlap of domains

The first proposed change pertains to challenging the assumption that the domains of psychosocial functioning of migrants, as defined by the model's creators, are non-overlapping. While this assumption proves useful in survey techniques where each domain is allocated a specific set of questions in the questionnaire, it presents a limitation when analysing qualitative data. In qualitative analysis, this division appears artificial and purely analytical, obscuring rather than elucidating the acculturation process. Our qualitative research, encompassing both Study 1 and Study 2, revealed that the phenomenon of intersection among 2 or more domains is prevalent.

Figure 2. Visualisation of a section of the code tree on acculturation domains according to the RAEM in a group of children
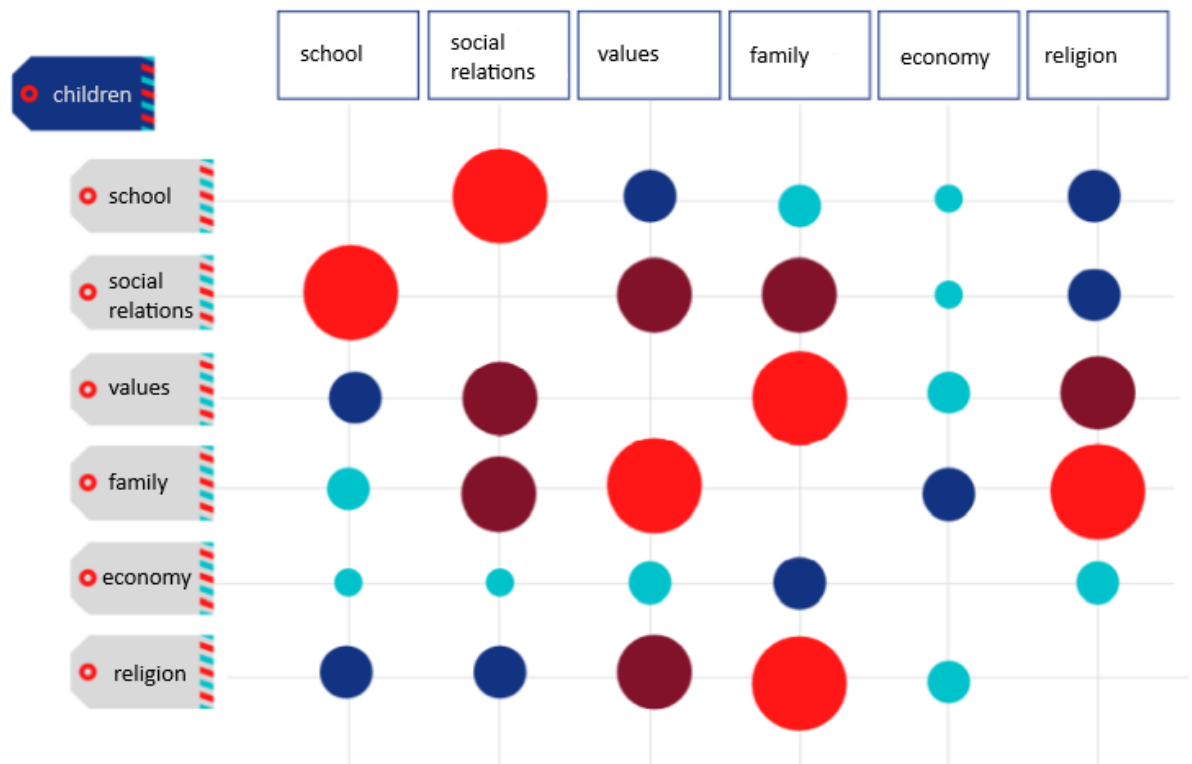
Source: Authors' elaboration.

The utilisation of multiple case-study or biographical-narrative research strategies, coupled with the consideration of context, enabled us to discern individual acculturation experiences showcasing a multitude of strategies in both the real and ideal planes, sometimes within a single domain and even for a single person. During the qualitative data analysis, we observed that life domains overlap, as illustrated in Figure 2 – which presents a visualisation of the relationships between codes in the code tree within Study 1. The diagram depicts categories resulting from the RAEM in the context of children's functioning. It illustrates how frequently given statements were coded with more than one category of code (the size of the circle indicates the frequency of coding with the same categories for a given statement). Many experiences are associated with more than one domain; for instance, attending a semi-private Catholic school can be interpreted within the domains of both school and religion. Similarly, buying Polish products in a Polish grocery store may be interpreted within the domains of family or economics. Among children, the most common overlap occurs between school and social relations, followed by family and religion or family and values. Examples of these overlaps are described below the diagram. Both the size (from smallest to largest) and the colour (from blue to red) correspond to the number of text segments coded with both a code from the category represented in the rows and a code from the category represented in the columns.

The first example (school and social relations) appears quite natural, given that the peer environment is significantly influenced by both Polish[1] and Spanish schools. Below is an illustration exemplifying how a Spanish-born child upholds Polish culture and shares it with her peers. This may suggest institutional support from the school, which aids the child in preserving her parents' cultural heritage.

Yes, I really enjoy speaking Polish and I do so regularly. I've been teaching my friends for 5 years now. I've taught them Polish songs. My friends Maria and Alba are going to Poland soon and we plan to spend time there together (Linda, 12 years old, Study 1).

This statement illustrates the adoption of an integration orientation within both the school and the social-relations domains. Despite not attending a Polish school, Linda effectively preserves her parental cultural heritage. A developmental theory reflecting a similar assumption regarding overlapping life domains is Bronfenbrenner's (1979) ecological systems theory, which posits the coexistence of multiple systems at different levels. Birman and Simon (2014) underscore that delineating life domains in acculturation analysis enables contextual consideration, aiding in understanding why individuals adopt varied strategies across different life domains. However, assuming acculturation occurs across microsystem, mesosystem, exosystem, and macrosystem, individuals do not acculturate solely within isolated domains.[2] Instead, life domains intermingle and mutually influence each other, contributing to the complexity of experiences between domains as well as within domains themselves (including the public and private aspects of experience, as discussed in the following section). The statement below also exemplifies this complexity, encompassing themes related to the economic domain, family relations and employment.

I finished school and started looking for a job. However, the wages for a medical caregiver are low, the workload is heavy and my husband disagreed. He said, 'No, you won't do it' and that was the end of it. So, I did some occasional cleaning work until 2015 (Olena, Study 2).

Instances of overlap between domains can also highlight significant emergent elements of the acculturation process. For example, discrimination often occurs in both the school/labour and social-relations domains, while illness may affect the family and social-security domains. Additionally, power distance can be observed across family, social relations and school domains, while aspects like food and leisure activities are relevant to

economics, family, religion and social relations. These intersections suggest that at the nexus of domains lie categories of experience directly reflective of the subjects' lived realities.

Public and private aspects of acculturation experiences inside RAEM domains

The authors of the RAEM originally classified the domains as peripheral and central or, alternatively, as public and private. In this discussion, we utilise the latter distinction because, from our perspective, it more accurately captures the features of these domains and carries fewer ethnocentric connotations, as highlighted in acculturation research by scholars such as Rudmin, Wang and de Castro (2016), among others. The terms 'public' and 'private' better convey the essence of these domains, avoiding implications of inferiority or hierarchy inherent in the terms 'central' and 'peripheral'.

The public domains encompass politics, social well-being, labour and economics, while the private domains comprise social relations, family relations, religion and values. As previously mentioned, when outlining the model, this division is grounded in the distinct trajectories of acculturation observed in the public and private domains (Arends-Tóth and van de Vijver 2004; Birman and Simon 2014; Rojas *et al.* 2014).

The theoretical underpinning of this division is not fully disclosed by the RAEM creators. We believe that it can be elucidated by drawing from sociology, specifically the conceptualisation of public and private domains articulated by scholars such as Sheller and Urry (2003). According to this perspective, private areas are those that the bourgeoisie sought to shield from state interference (Habermas 1989), thereby affording a certain degree of freedom of choice. For instance, while individuals generally lack the autonomy to dictate whether their workplace should employ migrants due to anti-discrimination laws, they retain the freedom to choose their social interactions outside of work (Haugen and Kunst 2017). A similar dynamic applies from the perspective of minority groups. For migrants, particularly those arriving, with their families, in a new country, cultural preservation typically occurs within the confines of the family home, constituting a private sphere. In contrast, the acquisition and learning of culture are predominantly driven by necessity within the public domain (Boski 2008).

Drawing from this theoretical framework and considering the insights gleaned from our qualitative research conducted with the RAEM, it becomes evident that the individual domains of psychosocial functioning among migrants do not exclusively possess a public or private character. Instead, each domain encompasses both public and private aspects, albeit in varying proportions.

In the realm of social relations, for instance, we encounter both work colleagues and close friends. Similarly, the economic domain encompasses not only household expenses and home-cooked meals but also expenditure related to public activities such as cinemas, swimming pools and concerts. Even in religion, typically perceived as a deeply private domain, there exist certain public manifestations, such as attending a church or mosque, participating in religious lessons at school or wearing religious symbols in public. Hence, we advocate for a more flexible approach in qualitative research, suggesting the analysis of each domain in terms of its public and private facets rather than rigidly classifying them as inherently public or private.

During interviews with respondents, it became evident that numerous private elements emerged in statements traditionally classified as pertaining to public domains, based on previous studies employing the model. Conversely, elements associated with public aspects of life surfaced within private domains, particularly in the realm of religion and social relations. This observation prompted us to contemplate the notion that experiences of both a public (peripheral) and a private (central) nature can manifest within any domain.

In this context, Dragan (Study 2) elucidates the significance of performing certain religious practices in public for the preservation of Serbian identity among migrants:

Specific aspects of identity and unique Serbian cultural threads are intricately linked to religion. Without these elements, Serbian culture would lack its distinctive essence. Take, for instance, the patron saint holiday. If this tradition were absent, Serbians would not truly embody their identity. Even Serbians who converted to other religions, such as Islam, continued to observe the patron saint's feast, despite no longer identifying as Christians. Hence, from this perspective, it's nearly impossible to dissociate oneself from religion.

The dynamics of change in these two aspects of the domain of religion – public/peripheral and private/central – can vary significantly. Someone may preserve culinary customs at home while also enjoying meals at local restaurants with friends; they may form close friendships primarily within their own cultural or religious group but also establish relationships, including romantic ones, with members of the host society. Similarly, individuals might choose to avoid displaying their religious identity in public spaces while actively practicing their faith in private settings, such as at home.

At the same time, while religious identity is often associated with the private sphere, it can also be manifest in public aspects of life. Participation in religious ceremonies, attending services at places of worship or engaging in religious community events can serve as public expressions of one's faith. In this way, the boundaries between private and public expressions of religion are fluid, shaped by personal choices, social norms and contextual factors.

The following experience serves as another illustration of a similar scenario, showcasing the adoption of separation strategies in the domain of social relations. This behaviour may stem from Zosia's recent arrival in Spain and her ongoing acclimatisation to new cultural norms. Zosia's encounter with the unfamiliar practice of hugging strangers, particularly among adults, underscores her discomfort with the perceived invasion of personal space – a manifestation of separation that pertains to the private aspect within the implicitly public domain of social relations:

In Spain, even if you don't know the person, they just hug you. Maybe children hug but adults, for instance, one kisses on the cheek and the other... but honestly, I don't know, it's a little strange... But I suppose you get used to it, so it's considered completely normal (Zosia, 12 years old, Study 1).

The domains originally delineated in the RAEM as private (social relations, family relations, values and religion) also encompass public aspects, wherein experiences indicative of an assimilation strategy transpire. Private experiences within these domains pertain to rules, values, and home life, while public aspects encompass leisure activities, social interactions in public spaces, and participation in public religious events. The mother of 13-year-old Adam (Study 1) sheds light on this topic:

My husband sleeps a lot. We've already adapted to the Spanish system here so, after lunch, it's 'siesta' time. We often tune in to the Polonia channel; for instance, we watch 'Father Matthew' on Tuesdays. [Interviewer: So, you already have such rituals.] *Yes, indeed. We, as a family, enjoy it. For example, we watch 'Father Matthew' while having our meal.*

The initial segment of the quote illustrates experiences indicative of an assimilation strategy within the family domain, particularly in the context of leisure activities. The reference to a 'siesta' denotes an after-lunch nap, commonly associated with Spanish culture. Here, the family adopts elements of Spanish culture related to leisure and communication, as they converse in Spanish at home. Simultaneously, Polish traditions remain strongly upheld in aspects such as communal meals, holiday celebrations and religious observances, indicating

a strategy of separation and the inherently more private nature of these facets of life. Taken together, it suggests that this family is pursuing an integration strategy within the private realm of family life.

This modification provides a deeper understanding of acculturation by highlighting that each domain of life encompasses both a public/peripheral aspect – where assimilation and integration experiences predominantly occur – and a private/central aspect, where separation and preservation experiences tend to prevail. Recognising this complexity serves as a guideline for future research, as it challenges the simplistic classification of domains as purely private or public (Arends-Tóth and van de Vijver 2004; Navas *et al.* 2005; Phalet and Swyngedouw 2003). This nuanced understanding acknowledges the dynamic interplay between assimilation, separation, integration and marginalisation orientations across various aspects of migrants' lives, fostering a more comprehensive analysis of the acculturation process.

Values as a transversal domain

The inclusion of 'values' as one of the domains of the psychosocial functioning of migrants needs an in-depth consideration. However, characterising this domain as proposed by the creators of the RAEM (i.e., placing it on a par with other domains such as work or family), is valid only if we assume its ontological equivalence with these other domains. Values can be treated as a separate domain only if we adopt the theory of objective values, which posits that certain objects possess intrinsic value (e.g., Platonic ideas such as goodness or beauty), while others do not. In this framework, it becomes possible to construct a closed catalogue of values applicable to every migrant and member of the host society, allowing the domain of values to function within the model alongside other domains, encompassing a distinct yet interconnected fragment of social life.

In quantitative research conducted based on the RAEM, all the distinguished domains are treated as separate entities with equal status, each having a specific set of questions in the questionnaire. However, we argue that the inclusion of values within this model can be theoretically justified only if an objective theory of values is adopted. Conversely, qualitative research conducted using the model suggests that a different approach may be more appropriate. To elucidate this point, we will draw upon Krzysztof Pałecki's (2013) concept of values and Shalom Schwartz's (2012) definition of values, although our considerations can be applied to most theories of values that do not assume their objective nature. Let us endeavour to comprehend the nature of values and discern what sets them apart from elements found within other domains of migrants' psychosocial functioning, such as family dynamics or economic activities.

Values, as delineated by Pałecki, are essentially effects, objects and/or states of affairs desired by individuals. In Pałecki's framework (2013), a value exists strictly when there is a perceptual relation between a particular subject and any object perceived by them, characterised by at least a minimal and tangible emotional response, known as 'aplusia'. Aplusia denotes a specific positive feeling encompassing attraction to, desire for, spontaneous acceptance of or satisfaction with the existence of a perceived object – or joy derived from its perception. Positioned within the discourse on the existence of values independent of human cognition, this concept aligns with moderate non-cognitivism. It disavows the existence of objective values, as these latter are always contingent upon someone's desires. However, it acknowledges the empirical demonstration that an object or state of affairs holds value within a specific social group. When a value is universally felt or endorsed by a significant portion of a given collective, it is qualified as a social value.

Operating under this assumption, values can manifest in various domains of social life, without necessarily constituting a distinct, stand-alone area. For instance, migrants may perceive a positive relationship with their boss at work as a value, which would fall within the professional/work domain. Additionally, they may value honesty in interpersonal interactions, pertaining to the social relations domain – or democracy, associated with

the political domain. Furthermore, certain consumer goods or money itself may also be perceived as values within the economic domain.

Moreover, values encompass both an ideal plane and a real plane. The ideal plane refers to the deeply internalised, lived values that genuinely guide an individual's attitudes and behaviours. In contrast, the real plane pertains to the explicit statements which people make about values, which may not always align with their actual lived experiences. This distinction allows for the recognition of a potential gap between declared values – which might be shaped by social expectations, norms or aspirational self-perception – and real values, which are authentically reflected in one's actions and decisions. Understanding this discrepancy is crucial for analysing value systems, as individuals may consciously or unconsciously express adherence to certain values which, in practice, do not fully shape their lived reality.

Hence, we advocate for treating values as cross-cutting and intersectional levels of analysis, rather than as a distinct domain of migrants' psychosocial functioning. An empirical illustration of this nature of values is evident in Natallia's statement, where participating in elections and fulfilling her 'civic duty' is regarded as a value. This activity can be situated within the domain of politics.

I care very much, that even when I didn't want to and I was saying that maybe I won't go, my friends said: 'How can you, after all, they gave you this citizenship for something'. So my friends from Belarus themselves, who also already have citizenship, were saying: 'How can you say that, you should go and take a selfie, show that you were there and voted' (Natallia, Study 2).

To support this modification of the model from a psychological standpoint, Schwartz's definition of values can be utilised as an alternative to Pałecki's concept (Schwartz 2012). According to Schwartz, values are cognitive representations or beliefs of motivational, desirable, supra-situational goals. These goals are significant as they drive our behaviour (what we do), justify our past actions (why we did them), guide our attention (what we notice) and serve as standards for evaluating people and events (who and what we like or dislike) (Schwartz 2006). Schwartz underscores the motivational aspect of values, emphasising that values themselves are defined by desirable goals that prompt action. Additionally, the transcendent nature of certain situations is pivotal in this characterisation of values.

Like Pałecki's perspective, Schwartz acknowledges that values can be subjective rather than objective. They represent desirable states of affairs for individuals, defined by them and subject to variation depending on the situation and developmental stage. In the case of children, values are largely influenced by those transmitted through the socialisation process by parents and the surrounding environment.
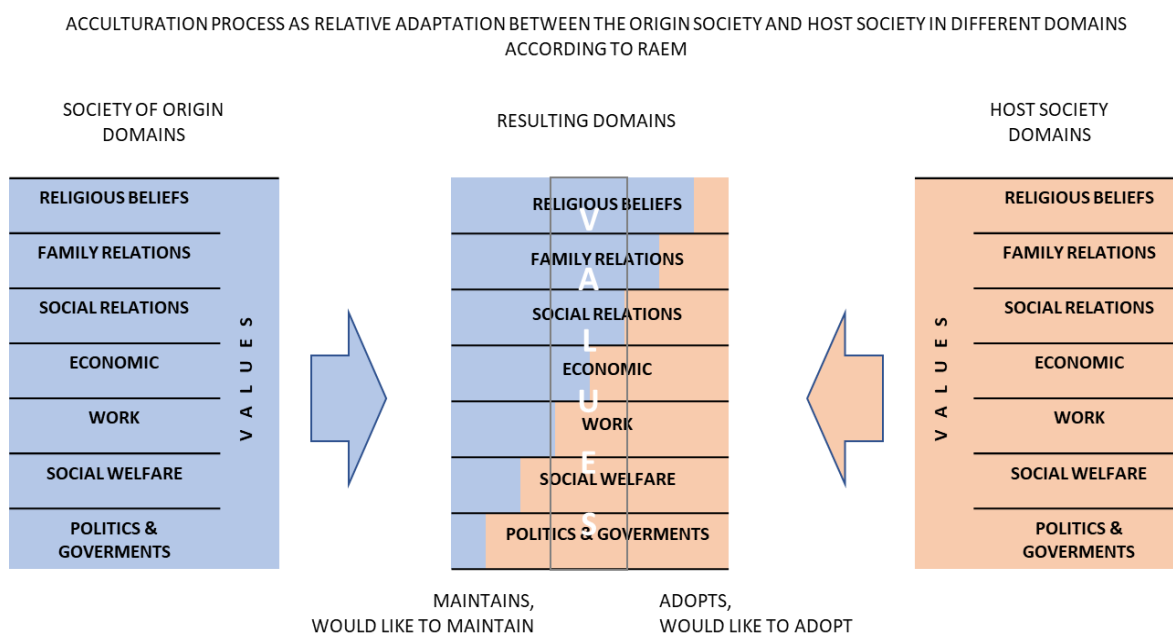
Using Schwartz's theory of values as an extension of the RAEM, as well as broader research on the acculturation process, it can be argued that behaviour motivated by values and characterised by an emotional connection to the object, can manifest itself in both the private and public aspects of any domain. In the RAEM questionnaire for young people, values are defined as 'friendship, companionship, respect for the elderly, equality between men and women, the role of religion in your life, etc.'. Once again, this observation highlights that all these elements are integral parts of other domains of acculturation. For instance, friendship and companionship are evident in the domains of family relations, social relations and school. Similarly, the role of religion in life is visible in the domains of economics, family relations and social relations. Respect for the elderly and equality between men and women can be observed in the domains of social relations, family and school. For example, Miłka's statement illustrates how values such as respect for the elderly are manifested in social interactions within various domains:

You can see very much that they (Spanish adolescents) laugh at others or if some old lady says 'Good morning' they look at her badly. I want to say something but I tell her 'Good morning' and that's it (Miłka, 14 years old, Study 1)

Therefore, these arguments also support a potential shift in the understanding of the domain of values in the study of the acculturation process using the RAEM, suggesting that it should be viewed as a transversal domain. This means that values are related to the motivation to take specific actions in the other domains of life proposed by the RAEM. Importantly, values should be interpreted from the bottom up, emerging from the data collected in a given study group.

Figure 3 is the diagram of the Relative Acculturation Extended Model after the modification incorporating values as a transversal domain. The change in the position of the values domain is visible in the diagram. In the original model (see Figure 1), it is placed below the other 7 domains whereas, in the modified version, it intersects all of them.

Figure 3. Relative Acculturation Extended Model after modification

ACCULTURATION PROCESS AS RELATIVE ADAPTATION BETWEEN THE ORIGIN SOCIETY AND HOST SOCIETY IN DIFFERENT DOMAINS ACCORDING TO RAEM

Source: Own elaboration and Navas and Rojas (2010).

Indeed, our reflections can be extended to other domains, albeit under specific circumstances. For instance, religion may also serve as a transversal and intersectional level of analysis in certain communities where it deeply influences nearly every domain of social life. This is particularly evident in traditional Muslim communities or those associated with Buddhist monasticism. In such cases, the relationship between religion and other areas of migrants' psychosocial functioning may mirror what we described regarding values.

Similarly, the domain of family can also play a transversal role during research with parents. This is because values associated with child-rearing significantly influence behaviours across various domains of life. Additionally, life circumstances such as illness can prioritise certain domains, such as social well-being and family, in the acculturation process. Therefore, considering these domains from a transversal perspective can provide valuable insights into the complex dynamics of the acculturation process among migrants.

Conclusions

Our variation of the Relative Acculturation Extended Model offers a more nuanced perspective on the acculturation of migrants through 3 key modifications. Firstly, it underscores the interconnectedness and interplay between psychosocial domains, recognising that they are not isolated but, rather, influence one another. This holistic approach allows for a more comprehensive understanding of the multifaceted nature of acculturation. Secondly, it introduces the concept that each psychosocial domain contains both public and private aspects, rather than being strictly labelled as private or public. This recognition allows for an appreciation of how the acculturation process may unfold differently in the private and public aspects of migrants' lives within each domain. Lastly, our perspective emphasises the relational nature of values, positioning them as a transversal element present in every psychosocial domain. Rather than treating values as objective and separate, this approach acknowledges their role in shaping behaviours and experiences across various aspects of life. Moreover, in our study, as noted by other researchers (Liebkind *et al.* 2018; Phinney and Alipuria 1990; Phinney *et al.* 2001), identity development plays a crucial role in the acculturation process, closely linked to the values related, for example, with religion or the social relations which an individual adopts. Thus, distinguishing values as a transversal sphere within the model may be beneficial for future research in this field. Together, these modifications enhance the suitability of the RAEM for qualitative research, enabling a more in-depth exploration of the complexities of the acculturation experience among migrants.

The original Relative Acculturation Extended Model laid a robust groundwork for qualitative research by offering a holistic perspective on the acculturation process within the expansive framework of migrants' lives. Its systemic approach enabled researchers to explore the intricate interconnections and interdependencies among different facets of migrants' psychosocial functioning, thereby facilitating a more nuanced understanding of their experiences compared to less complex models like Berry's two-dimensional framework (see Berry 1980; Berry and Sam 1997; Berry, Kim, Minde and Mok 1987).

Moreover, the adaptable nature of the RAEM model, conducive to adaptations and refinements, enhances its value for qualitative investigations. Through the introduction of modifications, such as those we have proposed, the model becomes even more accommodating to the unique intricacies of acculturation experiences among diverse migrant groups. Essentially, these adjustments amplify the model's efficacy within the domain of qualitative research.

The proposed adaptations of and modifications to the Relative Acculturation Extended Model (RAEM) introduced in this article open new pathways for research and theoretical exploration, as well as for its application in capturing the complexity of the acculturation process across different populations (adults, adolescents, children). Acculturation is a deeply individualised process, shaped by a dynamic interplay of multiple factors within specific social contexts. Any attempt to model it must therefore balance the need for conceptual clarity with the inherent fluidity of lived experiences.

The way in which we configure an acculturation model is not just a technical choice; it reflects a broader understanding of how individuals engage with society and navigate cultural change. While the RAEM offers a structured framework, we acknowledge that certain research paradigms – especially those rooted in highly emergent, bottom-up methodologies – may still find its categories too rigid. However, rather than serving as a strict classificatory tool, the model can function as a reference point or heuristic device for scholars employing inductive approaches, such as grounded theory. At the same time, our modification of the RAEM is particularly well-suited for qualitative studies that incorporate some level of predefined categorisation, offering, for example, a template for template analysis, an initial guide for developing codebooks or a comparative lens for cross-case analysis. As more qualitative research is conducted using this model, we anticipate that further

refinements and adjustments will enhance its flexibility, making it increasingly responsive to diverse methodological traditions.

Notes

1. Most children and adolescents who took part in Study 1 attend Polish Saturday Schools in which they study the Polish language and Polish History and Culture.
2. The microsystem, the closest layer to the child, encompasses direct interactions such as family or pre-school, impacting on behaviours like reliance, autonomy, cooperation and rivalry. The mesosystem, the second level, acknowledges that these microsystems are not isolated but interconnected, affecting one another. Acting as a bridge between these structures, mesosystem facilitates their influence. The exosystem, the third level, involves social contexts indirectly impacting on the child, though they are not directly involved, influencing their development. Lastly, the macrosystem, the outermost layer, comprises the intricate customs, values and laws significant within the child's culture (Bronfenbrenner 1979; Gardiner and Kosmitzki 2018).

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