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Editorial

## Life Course Justice and Learning

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### Abstract

There is a paradox: While life courses are de facto pluralising, the pull to conform to an imagined standard is strong. In this thematic issue, we unpack the question: To whose standards do people cohere over the course of their lives? We seek the answers through the idea of life course justice, by which we mean a critical inquiry into how wealth, opportunities, and privilege are distributed and constrained in certain life stages and situations, and geographically. The dual focus of this thematic issue is thus on how people forge new ways to learn and work and how they try to resolve life course differences.

### Keywords

inclusion; justice; learning; life course; life transitions

### Issue

This editorial is part of the issue “Life Course Justice and Learning” edited by Aija Lulle (University of Eastern Finland), Remus G. Anghel (SNSPA–National University of Political Studies and Public Administration / Romanian Institute for Research on National Minorities), Caitriona Ní Laoire (University College Cork), and Russell King (University of Sussex).

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### 1. Introduction

The philosophical basis for this thematic issue lies in social justice and issues of fairness concerning one’s life course. “Who gets what, where, and how” (Smith, 1987, p. 10) is a time-proven formula for studying inequalities and justice. It is illuminating when we apply this lens to a life course and learn about actually existing differences. So, how do justice and learning matter in life courses? They matter because formal and informal learning is ubiquitous throughout life (Biesta et al., 2011). The market approach usually focuses on what skills people lack and need to be trained to fit into the labour market or active ageing. Today the approach includes new digital practices to meet changing digital requirements in the 21st century (van Laar et al., 2017). This thematic issue departs from instrumentalist views on learning. Instead, we draw on Goodson (2012, p. 8), who argues that learning, in a broad sense, happens “where there are substantial shifts of self,” and Williams (2007), who states that all migrants learn due to their mobility across cultural environments. People always learn from border crossing (Goodson & Petrucci-Rosa, 2020), be those political borders, generational borders, or how people express themselves.

Inherently transdisciplinary, life course approaches are grounded in interlocking principles of lifespan, human agency, time and place, timing, and linked lives (Elder et al., 2003). In its most accepted definition, “life course” is “an age-graded sequence of socially defined roles and events that are enacted over historical time and place” (Elder et al., 2003, p. 15). Characteristically, life course approaches have three main views of what people do in life course stages. Youth is a time of “becoming” (Worth, 2009), with an emphasis on learning; midlife is about working and caring for others, for one’s relationships; and old age is, traditionally, about that time of life post-work.

Standard life course transitions are theoretically considered to take place in sequence, moving through education, learning job skills, embarking on a stable career, and establishing a home. This view originates from the relatively short period of the Fordist economy (Aboim & Vasconcelos, 2020). However, it profoundly influences knowledge production so that scientific language about standard life course transitions remains hegemonic. This thematic issue examines precisely the experiences of people whose life courses are deemed “non-standard” from national or capitalist market perspectives.

## 2. Beyond Standard Life Courses

Whether migrants or “locals,” people face inclusion challenges regarding their access to learning at different life stages; however, for migrants, the challenges are more remarkable as they move from one society and education system to another. The recent literature on life course transitions demonstrates increasingly greater diversity across life courses (de Jong & de Valk, 2020; Erlinghagen, 2021; Kley, 2011). However, people with so-called non-standard, unconventional, and non-linear life course transitions face distinct barriers and opportunities to follow an education, obtain jobs, and establish meaningful careers. Class, ethnicity, generation, gender, and other intersections determine who can access opportunities to study and subsequently develop decent careers; for some, all the channels are open, while for others the barriers are insurmountable or surmountable only with great effort.

To move beyond the impasse of the hegemonic role of the “standard life course,” we need to expose whose standards these are and how they affect people’s life chances in different places and times. How and which institutional powers constrain chances to study, work, and establish “homes”? Importantly, how does human agency play a role in overcoming such constraints? We, therefore, bring together two debates—that of justice and of learning in life course. Our task is to examine how geographical contingency affects the synchronisation and divergence of life courses (Bailey, 2009). We pave a way forward to unpack such life courses, caught between standardisation and plural lives. Hence, this thematic issue plays into, but goes significantly beyond, now long-standing debates about non-standard life course transitions. It examines human agency as relational and interdependent intergenerationally (Holloway et al., 2019), contingent in time and space, and against the backdrop of structural barriers.

We hope that researchers and policymakers alike will expand their social imagination of diverse life courses and their “capacity to aspire” (Appadurai, 2013, p. 287) for more fairness and equity in life opportunities. According to Appadurai (2013, p. 287), “to aspire is a navigational capacity,” meaning it is differently distributed along the lines of social difference, especially ethnicity, migrant status, class and gender, as well as age. Nevertheless, we argue that this capacity can also be learned and improved through learning individually and collectively.

## 3. Contributions

This thematic issue addresses the practical action of life course justice and learning. We look at what people and institutions do (Smith, 1987, p. 10) or fail to do to increase social inclusion of diverse life courses. Cara (2022), who studied Latvian children’s school performance in England, demonstrates that the geographic

location of schools and the administrative organisation of local authorities create inequalities that may contribute to the intergenerational transfer of disadvantage. le and Ursin (2022) argue that broader structural and sociocultural factors influence Roma youth transitions to adulthood. However, the authors challenge the existing homogenisation of Roma lives in Portugal and show how their linked lives play a significant role in tackling injustices. Anghel and Fosztó (2022) further argue that in the context of return migration to Romania, young Roma increasingly tend to demand equality and decent treatment, initiating a process of ethnic change. Grønning and Kriesi (2022) address inequalities in vocational education and training programmes. They convincingly show that general skills, as opposed to narrow practical skills, are decisive for long-term upward mobility. Osei et al. (2022) explore how youth in Ghana adapt to decision-making when they realise the misalignment between their migration aspirations and capabilities.

When it comes to adult life courses, Schroot (2022) emphasises the role of re-invention and skills acquisition in adulthood, while Haasler and Hokema (2022) demonstrate how female solo self-employment is functional as an individual strategy for action, allowing doing justice to their mid-life courses and needs to pursue both professional work and opportunities to choose when and how to work. Puzo (2022) deploys the concept of mobility justice and investigates the contingencies and non-linearities embedded in the transnational movements of contemporary precarious academic workers. Hepburn (2022) reveals that later life learning among Latin Americans in Canada should pay more nuanced attention to learning in and about a place, while Nguyen et al. (2022) contribute to a better understanding of digital citizenship and its role in supporting migrant grandparents’ adaptation to connected and mobile lives.

## Conflict of Interests

The author declares no conflict of interest.

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## About the Author



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Article

## Geography Matters: Explaining Education Inequalities of Latvian Children in England

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### Abstract

This article explores the issue of “geography of education” focusing on the pivotal contribution of place to one’s education. The geographic location of schools and the administrative organisation of local authorities that are responsible for state schools in England create sociospatial inequalities that are associated with individual life-course trajectories and can contribute to the intergenerational transfer of disadvantage. This article focuses on Latvian migrant families for whom better status often can be achieved through being included in the education system of the country. Therefore, the educational achievement of the children who speak Latvian at home but live and attend schools in England is the main focus of this article. The academic attainment of these children is well below not only the national average across all levels of compulsory education but also compared to both monolingual English speakers and all pupils speaking English as an additional language. The article provides evidence that in addition to the sociodemographic individual and family-level factors geography also plays a significant role in explaining the educational achievement gaps. As the descriptive quantitative analysis of the geographical and educational data indicates, Latvian children are disproportionately present in local authorities where there is a relatively high proportion of low-quality schools, a higher-than-average proportion of individuals with low qualifications and those in low-qualified jobs.

### Keywords

educational inequalities; geography of education; intergenerational; Latvian; migration; socio-spatial context

### Issue

This article is part of the issue “Life Course Justice and Learning” edited by Aija Lulle (University of Eastern Finland), Remus G. Anghel (SNSPA–National University of Political Studies and Public Administration / Romanian Institute for Research on National Minorities), Caitriona Ní Laoire (University College Cork), and Russell King (University of Sussex).

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### 1. Introduction

This article is positioned in the field of “geography of education” (Taylor, 2009) and contributes to the interdisciplinary field of sociology and geography and a long-standing discussion about the unequal geographical distribution of resources and social positions. I focus on the pivotal role that location plays in education by restricting or opening personal opportunities and thus contributing to the intergenerational transfer of disadvantage. The socio-spatial inequalities are particularly important for children because the location of their home and school links to their family circumstances and directly impacts their schooling experiences, which at least partially determine their life courses.

This article focuses on Latvian migrant families and the relatively low educational achievement of their children (Strand, et al., 2015) and considers the role of geography in explaining these educational inequalities. Education is of special significance for families who have migrated to a new country because status and position often are gained through the inclusion in—or exclusion from—the education system of the country. However, families and schools have access to unequally distributed resources as they are located in specific geographic places and, as McAreavey and Argent (2018), suggest whilst arguing for the importance of context in explaining the uneven nature of migrant social inclusion, neither is a “place powerless” nor is “power placeless.” Focusing on the characteristics of schools and local authorities

in England with a high number of children who speak Latvian at home, I explore the power of place. In the context of England where educational resources are redistributed at a local municipality level and the pupil's distance from school is one of the primary means of school allocation, it is not only who the parents are and what they do (Melhuish et al., 2008; Sylva et al., 2004), but also where they live that may create and maintain educational inequalities.

## 2. Theoretical and Empirical Context

### 2.1. Educational Achievement of Children Who Use English as an Additional Language

Twenty-one percent of primary and 17% of secondary pupils in England were identified as using English as an additional language (EAL; DfE, 2021). There are large regional differences in the number of pupils who use EAL. For example, in London, 44% of pupils used EAL in 2020–2021, the most of any region in England, whereas just 7% of school students spoke EAL in North East England. There is a considerable amount of research to show that some young people who speak EAL have a sizable risk that can harm their development of literacy skills and academic achievement (Alsford et al., 2017; Hoff, 2013; Strand et al., 2015) without appropriate support and understanding of their circumstances and need.

A lot of existing research considers the factors that may explain the educational outcomes of children who use EAL. Some researchers draw attention to individual-level factors such as the age of the child, their ethnicity, the subject of the exam taken, or the age at which the child came to England. All of these factors are commonly associated with English language proficiency among migrant children and their families (Demie, 2018; Hessel & Strand, 2021; Hutchinson, 2018; Strand et al., 2015; Whiteside et al., 2017). However, the EAL group is very diverse not only in their first language, ethnicity, and age of arrival, but also in their family settings and their life experiences. Therefore, some other researchers focus on family-level factors, such as socioeconomic circumstances or parental involvement (Arnot et al., 2014; Murphy & Unthiah, 2015; Schneider & Arnot, 2018).

Furthermore, other researchers focus on the role of schools in explaining the differences in academic achievement. As research shows, the quality of a school plays a role in children's academic achievement (Bramley & Karley, 2007; Dearden et al., 2002; Leckie, 2009; Mangan et al., 2010). There is research evidence that children of ethnic minorities and migrants may attend lower-quality schools which in turn impact their attainment (Dustmann et al., 2008; Kingdon & Cassen, 2007). However, Strand's (2010) study provided no evidence of differential school effectiveness concerning ethnic groups.

The quality of school education in England varies greatly, even in state schools and this discrepancy affects both the academic achievement of students and their

future educational prospects and choices, as well as their behaviour, safety, and well-being. Admission to a state school, whether primary or secondary, in England, is based on the "closest school" principle, which takes into account the distance from the school to home, and about half of the children attend the school closest to their house (Burgess et al., 2005). Many parents consider the quality of schools and the distance to the best school as the most important factor when buying a home or moving to a new place (Wilkins, 2010). This educational system creates and maintains class-specific local "circuits of schooling" (Ball et al., 1996) where schools often reflect the social composition of catchment areas (Webber & Butler, 2007) and strengthen existing educational outcome differences between social classes. In this context, opportunities for families who use EAL and their children are both enabled and constrained by spatial constructs (e.g., housing patterns, transport, social networks) that demonstrate the necessity of the spatial analysis of "lived" educational experiences (Ball et al., 1998).

There are differences in educational provision, access, and attainment in England across a variety of spatial scales from the regional to the local (Ball, 2018; Hamnett & Butler, 2011), and there is a need to talk about the geography of education in addition to already existing research geography of health and welfare (Bywaters et al., 2016). The nature of the "local" in England is complex and the structure of the English school system has been changing almost continuously since the 1980s. The present governance system is a mix of national, local, and school-level players. Although "local management of schools" instituted by the 1988 Education Reform Act has now changed, the local authorities with responsibilities for state education continue playing an important role to warrant accountability and responsiveness to the local circumstances of individual schools and communities (Woods & Simkins, 2014).

A much smaller number of studies has looked at the broader geographic locality context of the pupils who use EAL, although there is some evidence to show that it is a key moderator for educational outcomes for this group (Strand et al., 2015) but that regional disparities are shaping achievement chances for all young people as well (Allen et al., 2016; Allison, 2018; Gibbons & Vignoles, 2012). Moreover, research on so-called new immigration destinations (NIDs) demonstrates uneven social inclusion of migrants (McAreevey & Argent, 2018), particularly in less-diverse disadvantaged rural areas. Many migrant families live in precarious positions characterised by low wages, increased job insecurity, mobility, and flexibility as they face discrimination and unequal access to employment rights and have fewer social networks. Here, a family's socioeconomic circumstances are often interrelated with spatial dimensions of education and locality (Webber & Butler, 2007) which can produce an amplifying intergenerational effect.

Therefore, this study uses a contextualised, regional approach to understanding the experiences of EAL young

people to recognise the importance of the geographical location as migrants tend to settle in specific areas, and children migrate together with their parents. Migrant children's opportunities are shaped by the geography of migration of their parents and by the geography of opportunities that the locality has on offer. Not only the parental characteristics but their migration and geographical positioning influence the opportunities and educational outcomes for their children. "Geography matters" (Massey et al., 1984) for children, young people, and their families.

## 2.2. Geography of Education and Opportunities

There is a longstanding argument in social research that there is an unequal distribution of welfare based on one's locality. For example, Smith (1974) maintained that housing, health, education, and other forms of social provision are geographically inequitably distributed. Bringing the exploration of geographical reality into social research and integrating it with sociological or economist research approaches allows noticing that space is endogenous to the socio-economic processes and is uneven as it is produced by them (Sheppard, 1990). As Soja (1980, p. 211) argued, "social and spatial relations are dialectically inter-reactive, interdependent."

Economists, Plummer and Sheppard (2006) further expand the conversation about a socio-spatial dialectic when looking at social and spatial structural constraints on agents and their interdependencies. In this socio-spatial ontological tradition, represented in this article but adapted for a sociological focus, the relationship is twofold: Not only do people create and maintain spaces by engaging in collective action, but the preferences and behaviours of individual people are shaped by their socio-spatial position, the social structures, and the cultural context in which they find themselves. Social research therefore must consider how space may be linked to social processes and how geographical unevenness (Sheppard, 2002) and differences in the relative location of individuals can be crucial to the opportunities available and the outcomes for individuals (Tate, 2008). The power of place impacts our ability to choose what activities to engage in and what lives to live and, therefore, without an analysis of a geographical context or place, no research on educational inequality can be comprehensive.

Research on education at the level of community and neighbourhood is not new. As Taylor (2009) suggests, the exploration of space and place has been at the heart of UK educational research for a long time, including studies not only on the role of education and curriculum development in nation-building but also on the role of geographical locality in territorial justice and educational governance at the level of local authorities.

The work of Scottish sociologist Catherine Garner provides evidence for the essential role residential location plays, in addition to family factors, in shaping the

educational attainment of young people. The power of place demonstrated in Garner's study of neighbourhood factors and educational achievement in Glasgow is striking:

A school leaver with an advantaged home background living in an advantaged area has a 70 per cent probability of qualifying, whereas a school leaver with a disadvantaged home background living in a disadvantaged area has only a 3 per cent probability. (Garner, 1988, p. 248)

Garner's research suggests that policies and any action to alleviate educational disadvantage cannot be focused solely on schools or families but must include initiatives and interventions in immediate localities and the broader society (see Garner, 1988; Garner et al., 1987).

The UK geographical-education research explored a wider variety of issues ranging from the relationship between educational attainment and neighbourhood (Garner & Raudenbush, 1991) to school choice (Taylor & Gorard, 2001) and the impact of the regional governance of education on territorial justice (Rees et al., 2007). Most recently, Karyda and Jenkins (2018) suggested that living in a high-crime area is linked with an increase in the odds of a young person not being in employment or education (NEET).

There has also been some criticism about the inconclusive findings of neighbourhood effects research (van Ham et al., 2012) suggesting that this field needs to break away from the "tyranny" of neighbourhood (Petrović et al., 2020) and arguing for broadening and diversifying the understanding of localities for more nuanced approaches (Galster, 2012; Sampson et al., 2002) to bring the wider sociospatial context of people into social research. Petrović et al. (2020) advocate exploring microgeographic data to operationalise the concept as well as adding some temporal dimensions to explore what shapes individual outcomes across multiple scales and geographies.

While most researchers agree that the life opportunities of young people can be predicted by the characteristics of their neighbourhood (Sampson, 2017) there is still a debate about whether the neighbourhood effects are causal or if they reflect a selection of families with different characteristics in different neighbourhoods (Sampson et al., 2002). The most recent contribution to the debate was made by Belsky et al. (2019) providing evidence for modest genetic selection for poor educational outcomes. Therefore, neighbourhood effects should not be interpreted in purely causal terms as people are not found in localities randomly; people end up living in their neighbourhoods selectively. Belsky et al. (2019) suggest that poor education could be a more proximate cause of economic circumstances that then determine where families can live. This is even more pertinent in the case of the migrant population that often chooses to live where jobs and established social

networks are but, as NIDs research suggests (McAreevey & Argent, 2018), are also categorised by disadvantage, discrimination, and social exclusion.

Integrating geography and sociology of education, and most recently genetics, approaches allows separating individual, home, school and neighbourhood contributions to education outcomes and the research suggests that neither individuals and families nor schools are independent of their geographical location. However, in no way do I want to argue that family factors do not have any power beyond the location that families choose or are forced to live in and where perhaps most of the education happens outside school. Nevertheless, even this position warrants considering localities as schools, families, and children are a part of geographical neighbourhoods.

This article brings the sociology of education and geography together (Taylor, 2009) and is concerned with the spatial dimension by focusing on educational inequalities within localities. Additionally, this study considers the time dimension to bringing intergenerational aspects of space to explore the educational achievement of migrant children in England. There is a significant number of studies that focus on school characteristics, and parents' circumstances, but there is a paucity of studies that look at micro geographical data to explore the socio-spatial context. This study addresses it by combining National Pupils Database (NPD) data with data on schools, census data, and English Indices of Multiple Deprivation (IMDs).

### 3. Methodological Approach

I use different administrative datasets to explore educational outcomes and the socio-spatial context of families and children who are exposed to the Latvian language at home and who attend state-maintained schools in England. The first is the NPD, which is an administrative set of data on all pupils in state schools in England collected by the Department of Education. This database contains information on pupils' sociodemographic characteristics, such as gender, ethnicity, first language and special educational needs, as well as the results of pupils' standardised tests and examinations at various stages of education. The NPD dataset is suitable for research in the field of education because, unlike surveys, which represent a sample of students, it includes all students in state schools at any given moment. I combine this individual-level dataset with school census data that contains aggregated data at the school level, the average values of the exam results and the characteristics of the school (school size, type, etc.). Unfortunately, there is no information on family sociodemographic characteristics, so in this analysis, I only use the NPD data to look at the educational outcomes and spatial distribution in terms of schools and local authorities that are responsible for state education. As the NPD data contains administrative codes only for the local authorities with responsibility for state education in the analysis, I included 152 local authori-

ties out of 333. England has several tiers of local government and the relevant local education authority type and geographical area under its jurisdiction varies as education in the UK is a devolved matter with each of the countries having separate systems under separate governments, the NPD data limits the analysis to the pupils attending state schools in England as Wales, Scotland, and Northern Ireland.

In England, there is a special term for children who may use another language when they are outside school. These are identified as "children with English as an additional language," that is, these children come from an environment where they are exposed to another language but are educated in English. Until 2008, the NPD database contained only information on whether English was the first language; from 2008 onwards, schools must record the actual first language of the pupils. These changes make it possible to identify children with Latvian as their home language (LLH). This approach, of course, has its limitations. This approach underestimates the number of children that are exposed to the Latvian language at home as the dataset records only self-identified responses and there could be unobservable patterns of families self-selecting themselves into EAL or non-EAL groups. Therefore, this can potentially bias the full picture of where this group of children is located geographically. Moreover, I only had access to the individual data for the children who identified LLH and for the other language-based groups I only had aggregated data. Despite these limitations, these data are still valuable for the study of migrant children and young people and their educational outcomes in specific socio-spatial contexts as well as their integration into the English education system and localities.

The second database is an administrative data set containing the results of inspections by the Ofsted. The Ofsted inspects schools and other educational establishments to assess school performance and standards in terms of school management, pupil development and well-being, the quality of learning and teacher work, the implementation of the curriculum, and the care and support provided by schools.

As the third source of information, I use a database containing the English Deprivation Indices for 2015, which describes the level of relative prosperity in English municipalities. In total, there are seven main indices covering income, employment, health, crime, education, housing, and the living environment, and one general composite index. Each field has its number of points and ranks. In addition, two indices have been developed focusing on children and the elderly. I use both the education index and the financial disadvantage children-related index. The Income Deprivation Affecting Children Index (IDACI) measures the proportion of children aged 0 to 15 in families living in financial deprivation (e.g., receiving unemployment benefits, jobseeker/unemployment benefits, recipients of needy benefits, etc.). The Education Skills and Training

Deprivation Index demonstrates the lack of attainment and skills in the local population.

Finally, I use national census data for 2011 to look at the broader social context in localities with a high number of Latvian children.

#### 4. Findings

##### 4.1. Numbers and Attainment

According to the data of the Latvian Office of Citizenship and Migration Affairs (PLMP), as of 1 July 2015, 49,137 Latvian citizens lived in Great Britain, although the PLMP registers only those Latvian citizens who have officially informed them about their place of residence. The Latvian Ministry of Foreign Affairs estimated that around 100,000 Latvian citizens lived in the UK in 2015. The Workers Registration Scheme in England shows that between May 2004 and April 2011, 79,754 Latvian nationals registered to work in England. However, these data do not include any information on the length of stay. Self-employed individuals were also not required to register through the scheme. The National Insurance data show that in the period from January 2004 to June 2015, 161,994 Latvian citizens were registered. This dataset does record all individuals entering the UK for work purposes, including both students and the self-employed, but again the data do not show whether these individuals stayed in the UK permanently. Finally, UK 2011 census showed that 31,523 English residents indicated Latvian as their first language and 54,669 English residents indicated Latvia as their place of birth and 90% of them came to England from 2004 to 2011.

All these data show the general trends of migration of Latvian nationals to the UK, mostly England, but they mainly include adults. However, migration often affects entire families and many children come with their parents or are born in England. Table 1 shows both the changes in the number of children with LLH

and, for comparison, the numerical trends of all children who use EAL in the period from 2008 to 2015. Overall, the number of pupils speaking EAL has almost doubled. In the 2014–2015 school year, more than a million children (17.3%) who used EAL were enrolled in state schools in England. However, the proportion of LLH has increased even more significantly; it has increased ten-fold, from 739 in the 2008–2009 school year to 7388 in the 2014–2015 school year.

Table 1 also shows that the number of pupils using LLH is higher in primary schools than in secondary schools, which to an extent may relate to migration patterns as well as to integration or assimilation trends. By scrutinising the distribution of the number of pupils who have LLH by class and age in the 2014–2015 school year, it can be seen that the number of these pupils in secondary school classes is almost unchanged, indicating smaller migration trends among this age group. In primary school, on the other hand, this number is increasing with each subsequent grade, indicating that some children arrive in primary school.

A higher number in primary school could be because families with pre-school-aged children could be more likely to migrate. Then families with younger children who are just starting school and have recently arrived in the country might be more likely to use and report LLH. The difference between primary and secondary school can also be partly explained by the fact that data is often updated and checked during the transition from primary to secondary school, and children and families who identify LLH in primary school have an opportunity to switch to another identifier in secondary school. Moreover, secondary schools encourage identifying the pupil's primary or home language after a conversation with them, whereas in primary schools more often it is the parents who decide about the home language identification in the school paperwork.

Similarly to the recent studies of children who speak EAL (Demie, 2018; Strand et al., 2015) this NPD data

**Table 1.** Pupils with LLH between 2008–2015 (only state-funded schools included).

Year	Primary phase (4–11 years old)				Secondary phase (12–18 years old)				Total			
	All EAL		LLH		All EAL		LLH		All EAL		LLH	
	N	%	N	%	N	%	N	%	N	%	N	%
2007	447,650	13.5	271	0.06	342,140	10.5	106	0.03	789,790	12.2	378	0.05
2008	470,080	14.4	474	0.10	354,300	10.8	265	0.07	824,380	12.9	739	0.09
2009	491,340	15.2	689	0.13	362,600	11.1	404	0.11	853,940	13.5	1,093	0.12
2010	518,020	16.0	1,235	0.23	378,210	11.6	610	0.15	896,230	14.1	1,845	0.19
2011	547,030	16.8	2,221	0.38	399,550	12.3	1,024	0.25	946,580	14.9	3,245	0.33
2012	577,555	17.5	3,225	0.53	417,765	12.9	1,457	0.33	995,320	15.6	4,682	0.45
2013	612,160	18.1	4,046	0.62	435,150	13.6	1,714	0.38	1,048,310	16.2	5,760	0.52
2014	654,405	18.7	4,691	0.68	455,205	14.3	2,009	0.42	1,109,610	16.6	6,700	0.57
2015	693,815	19.4	5,137	0.74	477,286	15.0	2,251	0.47	1,171,101	17.3	7,388	0.63

Source: NPD data 2008–2015.

analysis (Table 2) shows that children who use LLH have on average lower attainment in secondary school compared to English monolingual and other children who speak EAL. At the end of the Reception, only 31% of children who have LLH reach a good level of development compared to 63% of pupils with English as their first language (FLE) and 53% of all pupils who use EAL. Looking at the odds ratio, it can be concluded that the chances of children who use LLH achieving a good level of development are 0.26 (or 74%) lower compared to those students who have FLE and 0.40 (or 60%) lower compared to all students who speak EAL. It would be expected that, at the very end of the first school year, children who do not speak English at all or use it relatively little at home may score lower on standardised school tests. What is surprising, even compared to other EAL children, is that Latvian-speaking children achieve much lower results.

Overall, the difference between pupils who use EAL and FLE disappears over time in the educational system. At the end of school, this difference is almost imperceptible. However, the difference between Latvian children and FLE does not change much over their schooling time. It decreases in Key Stage 2, but then comes back at the end of primary school and continues into the GCSE stage. It is important to note that the differences are slightly smaller in mathematics than in English language exams, which could indicate that some of the low academic achievements of Latvian-speaking children are related to English language skills.

#### 4.2. School Characteristics

To investigate the attainment of children who are exposed to the Latvian language at home, as previous research identified (Dustmann et al., 2008; Kingdon &

Cassen, 2007), it is important to look at the schools they attend. As Table 3 shows, children who have LLH are more likely to attend schools with an average higher number of pupils, which can be explained by the fact that many Latvian families have mostly settled in urban environments, where schools tend to be larger. These schools also tend to be more diverse and have a larger number of other children who use EAL and have a lower proportion of White British pupils and a higher proportion of other White pupils. These schools have higher than average proportions of pupils from disadvantaged backgrounds and are eligible for free school meals (FSM), which indicates financial difficulties for their families. Looking at the quality of schools that the LLH children attend, it can be concluded that the attainment across all school phases and subject areas is lower than the national average based on the results of the national examinations. Moreover, the Ofsted inspection outcomes regarding the overall effectiveness also indicate lower quality for primary and secondary schools attended by Latvian children compared with the national average level.

#### 4.3. Socio-Spatial Context

To investigate the social inclusion of pupils with LLH in the English education system, it is important to analyse the socio-spatial context of their geographical location. As can be seen from Table 4, most Latvian pupils attend schools in the East Midlands, Yorkshire, and the Humber and the East of England. These areas are not the typical regions with a large number of pupils who use EAL, such as Greater London or the West Midlands. However, as has been noted earlier, the schools that Latvian pupils are more likely to attend have a higher-than-average proportion of children who speak EAL.

**Table 2.** Standardised assessment results between 2014–2015 (only state-funded schools included).

Age	Phase	Subject	Measure	FLE (A)	EAL (B)	LLH (C)	Odd ratio (C vs A)	Odds ratio (C vs B)
5	Early years	Reading	At least expected level	76%	66%	43%	0.24	0.39
		Maths	At least expected level	76%	68%	48%	0.29	0.43
		Overall	Good level of Development (GLD)	63%	53%	31%	<b>0.26</b>	<b>0.40</b>
7	Key Stage 1	Reading	Level 2A+	59%	50%	45%	0.57	0.82
		Writing	Level 2A+	41%	36%	36%	0.81	1
		Maths	Level 2A+	54%	48%	51%	0.89	1.13
11	Key Stage 2	Reading	Level 4B+	80%	72%	46%	0.21	0.33
		Maths	Level 4B+	76%	75%	64%	0.56	0.59
16	Key Stage 4	English	GCSE A* -C	69%	65%	37%	0.26	0.32
		Maths	GCSE A* -C	71%	72%	53%	0.46	0.44
		Overall	GCSE 5+ A* -C, incl. English and Maths	61%	58%	30%	<b>0.27</b>	<b>0.31</b>

Source: NPD data 2014, 2015.

**Table 3.** State-funded schools with LLH in England, 2015.

	Schools with LLH		Schools without LLH		All schools in England	
	Primary schools (N = 2,047)	Secondary schools (N = 740)	Primary schools (N = 14,719)	Secondary schools (N = 2,047)	Primary schools (N = 16,766)	Secondary schools (N = 3,381)
Average pupil number	362	1,013	256	922	269	942
FSM %	20.9	18.6	13.5	13.7	14.5	14.8
EAL %	28.3	21.8	12.7	12.6	14.6	14.6
White British %	59.4	65.3	77.2	74.3	75.1	72.4
White Other %	9.9	6.9	4.3	3.8	4.9	4.5
Ofsted inspection outcome						
1: Outstanding	11.3	11.6	18.4	24.3	17.6	21.5
2: Good	64.7	50.9	64.4	50.2	64.4	50.4
3: Satisfactory	21.0	29.0	15.7	20.2	16.4	22.2
4: Inadequate	3.0	8.5	1.5	5.2	1.6	5.9
Primary schools: Achieve age-related expectations in reading, writing, and maths (all)	61.7		66.8		66.1	
Secondary schools: 5+ GCSE A*-C. incl. English and maths		50.7		59.4		57.4
English (reading)	73.3	70.3	77.9	73.6	77.4	72.9
Maths	72.2	61.6	74.9	68.0	74.6	66.5

Source: Spring School census data March 2015.

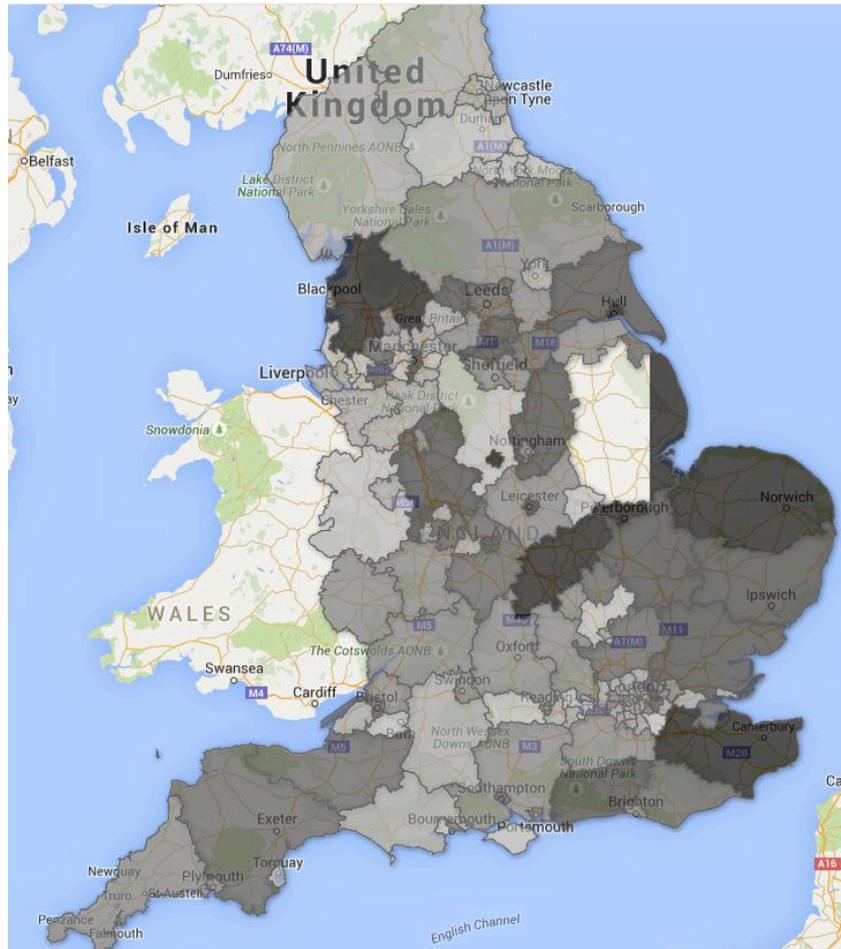
The map of local governments in England (see Figure 1) allows the visualisation of the geographical location of children who are exposed to the Latvian language at home with darker areas having a higher number of pupils with LLH. This demonstrates that although Latvian families live in most areas of England, they are more likely to settle in specific geographical areas.

A more detailed analysis of English local authorities with more than 100 LLH students (Table 5) shows that in the 2014–2015 school year 8% of all these pupils attended schools in Lincolnshire, 6% in Northampton, 5% in Peterborough, and 4% in Kent. The main economic sector of all these municipalities is the processing industry and agriculture, which also attracts large

**Table 4.** Pupils with LLH in the English education system per region, 2015.

	LLH		All EAL		
	N	% of all LLH	N	% of all EAL	% all pupils in the region
East Midlands	1,725	21.7	70,260	6.0	12.0
East of England	1,250	15.8	92,437	7.9	12.1
Greater London	696	8.8	468,009	40.0	44.9
North East	62	0.8	18,643	1.6	3.2
North West	662	8.3	114,009	9.7	12.6
South East	944	11.9	124,664	10.6	11.7
South West	419	5.3	38,875	3.3	6.1
West Midlands	892	11.2	141,349	12.1	18.9
Yorkshire and the Humber	1,283	16.2	102,855	8.8	15.0
Total	7,933	100.0	1,171,101	100.0	17.4

Source: NPD data 2015 and Spring School census data March 2015.



**Figure 1.** Pupils with LLH in schools in local authorities in England. Source: NPD data 2015 and Spring School census data March 2015.

numbers of migrants. However, it is also significant that although a large number of these children with LLH live in areas that have traditionally received migrants, such as Peterborough, Bradford, Leicester, Manchester, or London, a significant number have settled in municipalities with very few migrants.

Almost a quarter of all Latvian children live in the four local authorities and 63% live in 23 of the 152 local authorities that have responsibility for state education in England. This geographical distribution for the Latvian children’s location is similar to that of the population over the age of two, who specified Latvian as their main language in the 2011 Census. This allows us to conclude that the geographical location of Latvian families is relatively concentrated and sustainable. As the number of Latvian nationals in England increases, their location in municipalities proportionally does not change much.

It is also important to look at other socio-spatial characteristics of the localities with a large number of children who have LLH (Table 6). These children and their families live in areas with a large number of migrants from the Baltic States, but the overall level of migration in those areas is below average. It is also interesting to note that while the unemployment rate in these municipalities

is often below the national average, a large number of children live in relative poverty and are more likely not to attend university and drop out of school.

This reflects the geography of opportunities concept well and similarly to existing research on the NIDs (McAreavey & Argent, 2018), demonstrates that Latvians in England are more likely to settle in certain places with a specific social and economic context, particular labour market opportunities, and educational chances, where the locality can provide relatively low wages and requires unskilled labour. All these factors are also related to the quality of education and the level of schools in these municipalities, which in turn is possibly related to the achievements of children and the resulting future opportunities.

## 5. Discussion and Conclusions

The article demonstrated the power of place by presenting the case of Latvian migrants settling in specific areas in England. The thesis of this article is that geography may play a part in the creation of educational inequality and social exclusion and amplify its effects. This article contributes to the broader discussion

**Table 5.** Local authorities in England with 100 or more pupils with LLH, 2015.

Local authority	Pupils with LLH			Pupils who use EAL			Population with Latvian as their main language (aged 3 years and older) as per 2011 census		
	N	% all LLH in the locality	% from all EAL pupils in LA	N	% from all pupils in LA	% from all pupils in England	N	% population in local authorities	% from all with Latvian as their main language
		Lincolnshire	651		8.2	9.3		6,979	9.2
Northamptonshire	473	6.0	4.0	11,805	13.7	1.0	1,225	0.2	3.9
Peterborough	414	5.2	4.0	10,326	38.4	0.9	1,098	0.6	3.5
Kent	339	4.3	1.8	18,364	10.7	1.6	1,498	0.1	4.8
Kingston upon Hull. City of	250	3.2	6.6	3,798	13.8	0.3	718	0.3	2.3
Lancashire	248	3.1	1.6	15,461	12.2	1.3	885	0.1	2.8
Norfolk	248	3.1	3.3	7,479	9.2	0.6	919	0.1	2.9
Derby	206	2.6	2.8	7,476	23.1	0.6	895	0.4	2.8
Bradford	199	2.5	0.6	33,136	43.2	2.8	985	0.2	3.1
Cambridgeshire	195	2.5	2.4	7,977	12.7	0.7	798	0.1	2.5
Nottinghamshire	191	2.4	3.7	5,232	6.0	0.4	854	0.1	2.7
Coventry	181	2.3	1.3	13,754	32.2	1.2	674	0.2	2.1
Staffordshire	169	2.1	3.2	5,293	6.2	0.5	582	0.1	1.8
Wolverhampton	159	2.0	2.0	8,134	26.4	0.7	408	0.2	1.3
Wakefield	141	1.8	4.5	3,145	9.1	0.3	409	0.1	1.3
East Riding of Yorkshire	138	1.7	12.5	1,101	3.3	0.1	504	0.2	1.6
Leicester	128	1.6	0.6	21,149	50.4	1.8	483	0.1	1.5
West Sussex	123	1.6	1.4	9,013	10.4	0.8	628	0.1	2.0
Suffolk	119	1.5	2.0	5,981	8.0	0.5	396	0.1	1.3
Newham	113	1.4	0.3	33,880	74.8	2.9	590	0.2	1.9
Barnsley	105	1.3	9.5	1,103	4.6	0.1	214	0.1	0.7
Manchester	102	1.3	0.4	23,129	40.0	2.0	315	0.1	1.0
Essex	100	1.3	1.0	10,310	6.6	0.9	394	0.03	1.2
Total	4,992	63.0	—	264,025	—	22.6	11,651	—	57.3

of intergenerational barriers and opportunities in education for Latvian migrant children in England and their social inclusion by bringing together geographical, educational and administrative data to explore the socio-spatial dimension of educational inequalities.

This article demonstrates that children with Latvian home language in state schools are more likely to underachieve compared to monolingual English speakers and other pupils using EAL. The explanation offered by similar studies (Demie & Strand, 2006; Strand et al., 2015) focuses on a lower proficiency in English among both these children and their families. In addition, many Latvian children join the English education system in the later stages of primary or early stages of secondary school, and even if they have a good knowledge of

English, children need time to understand the system and adapt socially and emotionally. Finally, parents may themselves have poor English language skills and an understanding of the education system (Demie, 2013), which hinders their involvement in the learning process and their inability to help their children with their studies. This is certainly part of the explanation, but these results need to be seen in the light of the fact that if a child or their parents indicate that their home language is Latvian, this does not say anything about the pupil's English language skills.

The analysis shows that the educational disadvantage of children and young people who identify LLH continues into later stages of secondary school whereas for many other EAL groups the achievement gap decreases

**Table 6.** Local authorities in England with 100 or more pupils with LLH, 2015.

Local authority	2011 Census						
	Unemployment rate (2014)	% of children in poverty (IDACI)	% increased due to international migration (2014)	% Not pursuing education after age 16	% do not enter higher education	% White British	% identify as originating from the Baltic States
National average	6.2	19.2	54.0	21.1	61.2	79.8	0.2
Lincolnshire	5.2	23.5	44.3	21.2	73.8	93.0	0.8
Northamptonshire	4.8	27.2	48.2	23.9	73.6	85.7	0.4
Peterborough	5.9	34.9	89.4	27.5	70.2	71.0	1.9
Kent	5.7	35.1	33.3	24.7	72.9	89.1	0.2
Kingston upon Hull. City of	11.7	47.1	(a)	28.2	81.8	89.7	0.6
Lancashire	5.9	33.2	57.6	22.9	78.1	89.7	0.1
Norfolk	5.6	29.2	48.9	25.7	79.9	92.5	0.5
Derby	6.9	43.6	93.8	26.3	69.5	75.4	0.5
Bradford	8.9	41.1	69.7	25.8	77.0	63.9	0.3
Cambridgeshire	3.9	25.8	52.6	23.3	78.3	84.5	0.5
Nottinghamshire	5.6	35.6	28.9	24.7	82.3	92.7	0.2
Coventry	7.5	39.6	78.1	21.4	72.9	66.7	0.3
Staffordshire	4.3	30.1	52.3	19.0	75.9	93.6	0.1
Wolverhampton	11.3	47.2	62.9	21.4	67.9	64.7	0.5
Wakefield	6.9	30.7	33.1	31.1	78.0	92.8	0.2
East Riding of Yorkshire	4.8	25.7	23.2	27.1	81.2	96.2	0.2
Leicester	8.7	38.1	(a)	27.3	70.5	45.2	0.2
West Sussex	4.1	20.1	27.2	21.5	69.6	89.0	0.2
Suffolk	4.9	23.5	(b)	25.9	70.3	90.9	0.2
Newham	9.1	46.1	(a)	23.4	54.7	17.0	1.9
Barnsley	7.7	27.7	29.4	26.7	80.3	96.1	0.1
Manchester	9.5	53.2	75.5	27.1	75.6	59.5	0.2
Essex	5.3	27.8	21.1	21.4	70.0	90.8	0.1

Notes: (a) International net migration is smaller than internal migration plus neutral increase; (b) international net migration is negative.

or disappears. Therefore, it is important to look for some other explanations beyond the knowledge of English and the education system. While this study agrees with the other frequent explanation of the intergenerational transmission of (dis)advantage associated with parental characteristics and behaviours, the focus of this article was on the role of geography in this relationship. Education, particularly at the early stages, takes place locally as most children go to school close to their home.

One of the factors in play for the educational disadvantage is related to the quality of schools (Dustmann et al., 2008; Kingdon & Cassen, 2007). There is evidence that in the context of the school choice system in England migrant parents sometimes lack information and knowledge about schools and the school system and,

as a result, are unable to “place” their children in better schools. However, I would like to take this further and argue that even if the parents understand the system, they may be restricted in their choice of schools to those in their geographical proximity and not have the resources to relocate to a local authority with a better choice of schools. As the analysis of the geographical data suggests, Latvian children are disproportionately present in specific local authorities where there is a higher-than-average proportion of individuals with low qualifications and those in low-qualified jobs as well as a relatively high proportion of low-quality schools.

The data show that many Latvian migrant families in England do not settle in typical “migrant” regions or urban areas, such as Greater London or the West

Midlands. Thus, this article contributes to research on a specific type of migration—NIDs where international migrants settle in rural and regional communities with little prior experience of migration with varying attitudes to immigrants and immigration (McAreevey & Argent, 2018). This uneven nature of migrant social inclusion strengthens the importance of socio-spatial context.

Latvian nationals in England are more likely to live close to other families and people from Latvia and other Baltic countries (Dzenovska, 2017; Kaprāns, 2022), forming relatively segregated communities that may not provide as many opportunities to learn about the education system and find help with these issues within the community. Here it is difficult to assess how much the “choice” of the lower quality schools is the result of the parents’ insufficient knowledge about the English school system or simply there is an overall lower quality of education in the locality where Latvian families live.

The Latvian migrant families could be at risk of double exclusion which can contribute to the academic achievement gap of their children. Firstly, the educational context in rural local authorities in England is different from urban areas with a higher level of need, competing priorities and fewer resources to share (Ball, 2018; Bywaters et al., 2016). Therefore, Latvian families are more likely to live in socially disadvantaged areas. Secondly, while shared spaces in the local community, such as schools, bring different groups together, encouraging interaction and facilitating inclusion, some migrants, including Latvians (Dzenovska, 2017; Kaprāns, 2022; Schneider & Arnot, 2018; Tereshchenko & Archer, 2014) may remain socially excluded. So, the geographical location can affect the educational success of Latvian children affecting the quality of schools they attend, the social links in the community their parents have and the economic opportunities their families have. The study demonstrates social-interactive, geographical, and institutional mechanisms (Galster, 2012) that are in play and provides further (Belsky et al., 2019; Garner, 1988) evidence that educational policies and any action to lessen educational disadvantage need to support migrant children and families directly but also must include effective place-based interventions and initiatives in immediate localities and the broader society.

Of course, the nature of the explanation on this issue is not so clear, and most likely all of the above explanations are valid. This article provides evidence for the power of geography and place in creating and strengthening intergenerational educational inequalities. Children do not choose where to live or study, it is their parents and families who are making these choices or are forced to settle in specific geographical locations. Migrants move and follow specific jobs and settle in areas where they have some social connections. However, assuming “real” causal relationships between spatial contexts and individual outcomes is problematic as “neighbourhood effects” may reflect effects from multiple contexts with different temporal and spatial scopes.

Geography of education is useful but needs to be careful in measuring the degree of impact as factors interact and there are unobserved factors that come with the interaction for example, between parental involvement and locality, that also can reinforce the disadvantage, transmitting it between generations, and acting as a barrier to social integration.

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### Conflict of Interests

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Article

## The Twisting Path to Adulthood: Roma/Cigano Youth in Urban Portugal

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### Abstract

While there is a growing body of research on Ciganos/Roma in Portugal, little is known about how Cigano youth transition into adulthood. In this article, we address this gap by drawing on a qualitative study on the transitions of young Ciganos living in Cascais, a coastal municipality in the Lisbon district. Using a multi-method approach, we explore the life course trajectories of Cigano youth within the areas of education, livelihoods, and marriage, and how these areas shape their transition experiences. The empirical material shows that the transition into adulthood of Cigano youth is influenced by broader structural and socio-cultural factors. Processes of socialization, ethnicity, and gender restrict young Ciganos' participation in education and formal labor markets, which increases their vulnerability to marginalization and exclusion in society. Cigano youth, however, initiate different pathways in their life trajectories to achieve adulthood. By focusing on the voices of Cigano youth, we challenge the homogenization of their lives in Portugal and highlight how social age and linked lives shape their transitions into adulthood.

### Keywords

Cigano/Roma; education; linked lives; marriage; social age; youth transition

### Issue

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### 1. Introduction

Despite the European Union and Portugal's concern with inequalities and citizenship of Ciganos/Roma, poverty, illiteracy, marginalization, and social exclusion continue to be prevalent within this population (ERRC/NÚMENA, 2007; FRA, 2017; Magano & Mendes, 2021). Portuguese Ciganos are generally perceived as a homogenous group, stereotypically depicted as “nomads,” free from commitments and bonds except blood ties (Mendes, 2007), living in social housing alongside other Cigano families (Magano, 2017). These generalizations, however, dismiss the individual diversity and cultural plurality of Cigano life paths and fail to cover the complexity of their social realities (Magano, 2017, 2022). Cigano culture in Portugal is commonly based on customs and the value attributed to age and experience, shaping

their notions of status, gender roles, family relations, and distancing them from non-Ciganos (e.g., Magano, 2010; Mendes, 2007). While groups may “claim to own culture” for the sake of group identity, “not everyone inside a group [of Cigano culture] shares the same beliefs and norms” (Anderson-Levitt, 2012, pp. 444–445). Hence, being a Cigano is connected to experiences and processes of socialization that individuals acquire within their own ethnic group by sharing moral values (e.g., respect, honor, shame) and traditions and customs expressed through rites of passage (Magano, 2010), which are regarded as pillars for group cohesion and identity (Hogg et al., 2017). In the Portuguese context, the word for Roma individuals is *ciganos*. We use the term in Portuguese, capitalized, because it is recognized and used by Portuguese Ciganos themselves (see Magano, 2017).

While there has been an increase in research on Portuguese Ciganos in general, there is a paucity of research on how Cigano youth experience transitions into adulthood. In any socio-economic context, youth is considered a life-changing period in which young people acquire and develop educational and training skills that are crucial components in achieving adulthood (World Bank, 2006). However, studies have shown that there are many ways in which young people live and experience such transitions, varying within and across ethnicity, social class, gender, and geographical environment (e.g., Arnett, 2007; Ursin & Abebe, 2017; van Blerk, 2008). Structural and socio-cultural factors allow us to understand the diverse contexts that impinge upon the transitions of young Ciganos, as they share and initiate different stages in different dimensions of their life trajectories (Magano, 2017). In this article, we draw on an ethnographic and a multi-method study to explore the complexities of transitions through education, work, and marriage of Ciganos coming of age in Cascais, Portugal, and to show the importance of “social age” (Laz, 1998) and “linked lives” (Heinz, 2009) in their transition experiences.

The study aims to explore how both Cigano and mainstream Portuguese culture influence Ciganos’ transitions to adulthood. We start with an overview of the theoretical and conceptual framework and previous research on youth transitions, followed by a contextualization of young Ciganos regarding education, employment, and social policies in Portugal and a provision of some key features of contemporary Cigano society. In the methodology section, we discuss the study’s research design and ethical considerations. Then we present the empirical material, exploring the interconnected themes of schooling, livelihoods, and marriage before discussing the data in relation to previous research and chosen conceptual framework. At last, we offer a brief conclusion.

## 2. Conceptualizing Youth Transitions

In the mainstream culture of the Global North, youth transitions have commonly been seen as moving from dependency to independency. Inspired by developmental psychology and analyses of post-war generations, youth studies in the 1980s and early 1990s detected three main pathways of becoming a “successful adult”: school-to-work transition, domestic (family) transition, and housing transition (Coles, 1995). Although researchers have documented that youth transitions of the 1950s and 1960s were more heterogeneous than previously assumed (see Galland, 2007), it remains the “golden standard” of growing up. Hence, the acquisition of higher education, entry into the formal labor market, and subsequent economic independence are perceived as essential transition markers by leading international organizations (see UNICEF, 2011; World Bank, 2006). Youths who fail to comply with the golden standard have been labeled “deviant” (Jones, 1995) or having transitions that are “delayed, broken, highly frag-

mented and blocked” (Chisholm, 1993, as cited in Wyn & White, 1997, p. 95). Furthermore, the golden standard promotes a normative understanding of youth and adulthood, rendering early marriage, teenage pregnancy, and school dropouts as “social problems.” The applicability and universality of the golden standard have been criticized as more diverse accounts of young people’s biographies are increasingly informing theorizations (Furlong et al., 2011; Robertson et al., 2018; Ursin & Abebe, 2017; van Blerk, 2008).

Youth is rooted in socio-temporal spaces where social categories are experienced and interpreted differently. Bearing in mind that “youth” is a socially and culturally constructed phenomenon (cf. Berger & Luckmann, 2000), its existence as a distinct category of life is neither biologically determined nor universal but differs across space and time. According to Berger and Luckmann (2000), social constructionism is advantageous as an analytical tool when exploring interpretations, in this case questioning the “taken-for-granted-ness” of how youth transitions unfold. Here we would add that while the period of youth as a social phenomenon has been extensively analyzed within the social sciences, there is a need to unravel the social construction of adulthood as it is often rendered self-explanatory, permanent, and universal within transition studies (Horton & Kraftl, 2005). As some studies have demonstrated, (young) adulthood may also be transitory, multiple, ambiguous, and complex (Langevang, 2008; Ursin & Abebe, 2017).

We are inspired by theorizations concerning social age as opposed to chronological age, where the social interpretation of age is ascribed meaning contextually, determined by historical, political, biological, cultural, and social conditions (Clark-Kazak, 2013; see also Laz, 1998; Sjørsvæn & Ursin, 2021). Laz (1998) suggests that the way age is “done” is shaped by normative understandings and expectations around how we are supposed to “act our age.” She describes how experiences and expectations of aging, as well as life course transitions (i.e., education, marriage, childbearing, and work), are patterned by—and work in interplay with—ethnicity, class, and gender in addition to political and economic forces that give rise to the institutions, practices, and policies that create and reinforce these patterns. However, whilst our culture provides us with resources for “doing age,” individuals draw on and give meaning to these (see Sjørsvæn & Ursin, 2021). While we often conform to prevailing norms and conceptualizations, we might also question these in the process of creating and maintaining our selves, roles, and identities (Laz, 1998). Transitions thus occur at the intersection of personal choice, and rejection, and adaption to cultural, bureaucratic, institutional, and structural factors.

As Huijsmans (2013) asserts, a relational approach to age is beneficial, as it is attentive to agency while appreciating how relations of age are tied into structural processes. To make sense of life courses, it is important to emphasize highly relational aspects, varying

by class, ethnicity, gender, and other social variables. Walther (2006), for example, defines southern European countries as sub-protective transition regimes characterized by a low percentage of formal employment and a high rate of unprotected living conditions, resulting in youth transitions that are marked by informal work and high dependency on extended family. He dismisses what he perceives as “a diagnosis of ongoing de-standardization, individualization, and fragmentation of transitions” (Walther, 2006, p. 120) in the European context. Following this, Jeffrey (2010) challenges the assumption that people move from dependence to independence, arguing that adulthood is more about states of interdependence rather than autonomy in many societies (see Ursin et al., 2022). Aligned with the relational approach, Heinz (2009) notes that while we have succeeded in documenting young people’s agency in transitions, we know little about how “linked lives” (i.e., their relationships) contribute to the outcomes of transitions. Similarly, while transition points and markers such as school-to-work provides insights into life trajectories, Wyn et al. (2019) argue that such focus ignores the fact that young people’s relationships enable these transitions. In the same vein, others have argued that youth transition pathways should not be perceived simply as a means of securing education and employment but should also be acknowledged as new spaces of identification and belonging (Robertson et al., 2018; Wyn et al., 2019).

Although few studies focus specifically on youth transitions among Portuguese Ciganos, some studies explore education, work, and marriage, documenting great cultural heterogeneity and variation in social and spatial integration (Magano, 2010; Mendes, 2007; Nicolau, 2010), particularly between those who live a Cigano life from those who live a non-Cigano life, with several differences in terms of lifestyles (Magano, 2010). Recent studies reveal changes within the Cigano communities in terms of increased educational level, stronger ties to formal employment, and weakened traditions of early, arranged marriages (Magano, 2017, 2022; Mendes & Magano, 2016). However, the tradition of the Cigano marriage remains a tenet of the Cigano culture and a rite of passage to the adult Cigano world (Magano, 2017, p. 50). Marriage functions as an affirmation of Cigano culture through the valorization of endogamic marriages carried out at a very young age, especially for girls upon reaching the age of puberty (Magano, 2017; Mendes & Magano, 2016). This current study draws on valuable findings from previous research and adds a novel focus on life course transitions among young Ciganos with an emphasis on their relationalities—their so-called “linked lives.” In the following sections, the current situation of young Ciganos will be described further.

### 3. Cigano Youth, Education, and Social Policies

Ciganos are the poorest ethnic group with the worst housing conditions in Portugal (Mendes & Magano,

2016). Many Portuguese Ciganos are illiterate and do not complete any level of schooling, including compulsory schooling (12 years of schooling; see Magano, 2022; Mendes et al., 2014). Drop-out rates and school failure continue to be common among Cigano children even before the completion of the second cycle of the Portuguese school system (6th grade; Mendes et al., 2014). Girls leave school between the ages of 11–14 and boys between 16–18 years of age (Mendes & Magano, 2016). A survey carried out in public schools by the Ministry of Education showed that the number of Ciganos enrolled in schools decreases as the level of education advances, and this is more noticeable for girls (Direção Geral de Estatísticas de Educação e Ciência, 2020).

In a national study about Cigano communities, Mendes et al. (2014) found that 57% of Ciganos were unemployed, looking for a job, or had never been employed. Those who reported being unemployed said that they took on traditional, low-skilled activities within the informal sector (e.g., street vending, agriculture, cleaning, and construction) and did not recognize these activities as work. According to Mendes et al. (2019), there is a strong presence of Ciganos in informal jobs, but a growing insertion of Ciganos (sometimes having to hide their ethnic identity) in the formal labor market is also noticeable. In the job market as in the rest of society, Ciganos are often subject to systematic racism and discrimination (Magano, 2017; Mendes & Magano, 2016).

In an attempt to improve the situation of the Roma people at a national and European level, the European Union prosed that member states define national strategies for integration (European Parliament, 2011). The Portuguese National Strategy for Integration of Ciganos (ACIDI, 2013) is based on four main goals, including access to health, education, housing, and employment/vocational training. This strategy was reviewed in 2018 by acknowledging that, despite considerable social changes in the past years, many Ciganos still face discrimination, poverty, and social exclusion (Mendes et al., 2014). This review sought to improve Ciganos’ integration and general well-being as well as deconstruct stereotypes between Ciganos and non-Ciganos (Mendes & Magano, 2021). Recent changes were made in the definition of the strategy, specifically in terms of clarification and implementation of the measures, and the prioritization of interventions regarding gender equality, knowledge about Cigano individuals, and their participation in the implementation of this strategy (ENICC, 2018).

Several social policies have been implemented in Portugal to increase the educational level and vocational training of the Portuguese population, such as the Educational Territories of Priority Intervention, the Social Insertion Income (RSI), and the New Opportunities Program, to name a few. The Operational Program for the Promotion of Education, awarding scholarships to Cigano students, and the Educa program to support Cigano students in primary and secondary education

were recently developed (Magano, 2022). Much effort has also been put into promoting equal work opportunities for, and integration of, Cigano youth in the formal job market. Of relevance to the following analysis, the Municipal Mediators Pilot Project, launched in 2009, employs Ciganos as mediators to liaise between Ciganos and mainstream society and improve Ciganos' access to local services (Castro et al., 2010).

#### 4. Conducting Research With Cigano Youth: The Methodology

This study draws on data from two-month fieldwork carried out by the first author with young Ciganos in a neighborhood in Cascais. The overall aim of the study was to explore Cigano youths' transitions to adulthood. The first author was familiar with the participants' culture and fluent in the local language. Purpose sampling strategy was used for the selection of the research site, and we also relied on snowball sampling to find Ciganos who wanted to participate in the research. It proved difficult to recruit girls, perhaps because they depend on parents' and husbands' consent, as per cultural customs. Therefore, in-depth interviews were conducted with eight youths of 17 to 24 years of age with similar social origins: Five boys and one girl whose parents were both Ciganos, and two female siblings (Ines and Katia) whose mother was Cigano but whose father was not. The sample size allowed for an in-depth approach to a novel analytical insight and generate rich data (Vasileiou et al., 2018). Table 1 provides an overview of the participants' statutes regarding education, work, marriage, and parenthood. Most participants' parents had low schooling levels (one being illiterate). All participants lived in social housing.

The data was collected between June and August 2015. The study was inspired by a rights-based approach, ensuring participants' rights throughout the research process (Ennew et al., 2009); it had a multi-method approach that included participant observation and informal dialogue, focus group discussion, semi-structured interviews, and used the life-grid method. Contextual information about young people's everyday lives was obtained through participant observation and informal dialogues in community spaces, such as cafes, supermarkets, sidewalks, and bars. This enabled development and redefinition of research themes and contextualization of empirical data gathered through other methods (Ennew et al., 2009).

Six participants participated in two gender-segregated focus groups: One group with three girls and one group with three boys (see Table 2). Examples of general themes discussed are: when is one considered an adult; what does it mean to be an adult; similarities and differences between Cigano and Portuguese culture; relationships with non-Ciganos.

Examples of questions in the individual interviews are: How is/was your life at school? How do you make a living? What culture do you think influences you the most? For participants who found it difficult to recall events or who showed difficulties in expressing themselves verbally, the life-grid method was employed. This tool and the visual overview of their life histories functioned as a good aide to memories (Bell, 2005). The life events written on the grid mostly concerned age/event, including work, family, and culture, facilitating further discussion.

Focus groups were tape-recorded and lasted approximately one hour each. The individual interviews were also tape-recorded (except one, for which notes were made manually as this participant felt uncomfortable

**Table 1.** Biographical overview of participants.

Name	Age	Schooling level	Given reasons for school dropout	Occupation	Marital/parental status
Bruno	19	5th grade	Did not learn anything about Cigano history, culture, and customs	School mediator	Single/no children
David	22	5th grade	Did not learn useful knowledge	School mediator/ Drug dealer	Married/no children
Fabio	19	12th grade	Not relevant	Student	Single/no children
Gabi	17	8th grade	Forced by father	Domestic work	Married/with children
Ines	24	Higher education	Not relevant	Unemployed	Single/no children
Katia	19	4th grade	Finds education unnecessary to make a living	Domestic work (vending)	Married/with children
Miguel	22	5th grade	Felt stigmatized and excluded in the classroom by his teacher and colleagues	Drug dealer	Married/ wife pregnant
Rui	22	5th grade	Did not receive support and encouragement from home	School mediator	Single/no children

**Table 2.** Overview of participants’ gender, age, and involvement in research tools.

Name	Age	Gender	Research tools
Bruno	19	Boy	Focus group/Individual interview
David	22	Boy	Focus group/Life-grid
Fabio	19	Boy	Individual interview
Gabi	17	Girl	Focus group/Life-grid/Individual interview
Ines	24	Girl	Focus group/Individual interview
Katia	19	Girl	Focus group/Life-grid
Miguel	22	Boy	Focus group/Individual interview
Rui	22	Boy	Individual interview

being recorded) and lasted between 30 minutes and two hours. All tape recordings were transcribed verbatim by the first author. In analyzing the transcripts, we engaged in a community of interpretation and validation (Brinkmann & Kvale, 2014). Key themes were identified according to the study’s aim and organized according to descriptive and analytic codes (Creswell & Poth, 2016). Recurrent themes were school experiences, livelihood opportunities, and preparation for marriage, which structures the following analysis. We chose excerpts describing young Ciganos’ sensemaking of their pathways to adulthood, explored literature and theories to better understand the complexity of these paths, and discussed and validated analytical points.

The study was approved by the Norwegian Social Science Data Services. Participants provided both written and verbal consent before the study started. They were assured that their privacy and anonymity would be secured and that they could withdraw from the study at any time without providing any reason. The young participants decided on the venue for the interviews and focus groups, suggesting the Youth Club as it was convenient and comfortable, being local yet providing privacy to talk freely.

## 5. Results

In the following, we explore our main themes: (a) young Ciganos’ gendered encounters with the school system; (b) childhood and adolescence as preparation for marriage; and (c) finding livelihood possibilities at the margins of society. The themes are closely interrelated, affecting one another, as the following will demonstrate.

### 5.1. Young Ciganos’ Gendered Encounters With the School System

#### 5.1.1. Male Experiences of Discrimination and Lack of Recognition

For many Cigano boys, school life was marked by discrimination, exclusion, and prejudice by teachers who “othered” them based on their ethnic background.

Miguel recalled: “My teachers used to put me in a corner by myself and would only talk to me when other students didn’t need her.” Rui and Fabio were favored by their teachers for having minimal Cigano physical traits. Rui reported that his teacher considered him a smart boy, who responded “perfectly for his age mentality.” However, this changed radically when the teachers discovered his Cigano ethnicity and started to ignore him. Like Rui, Fabio said that not having typical Cigano traits was to his benefit at school, and he would consciously hide his ethnicity.

In addition to ethnic discrimination as a form of othering Cigano boys at school, they also expressed a lack of relevance of formal schooling. While some boys criticized the lack of Cigano history, culture, and customs in Portuguese national curriculum, others felt the culture of schooling is incompatible with Cigano culture. For example, Bruno stated: “Schools should also include *our* history and music.” David acknowledged that schooling was necessary to learn to read and write, which they needed “to get a driving license” and “deal with government bureaucracies,” suggesting the very practical reasons why one would attend school. He complained that schooling should be “more orientated to practical life.” Similarly, Miguel did not see schooling as a means to achieve a livelihood in his future: “I won’t get money from books.” Bruno reasoned that he “didn’t have a head to be at school” and that Ciganos “don’t go far in school.” Overall, the boys confirmed a belief that schooling is not only irrelevant but also incongruous with Cigano social life and identity.

#### 5.1.2. Female Experiences of Gendered Expectations

The girls’ school experiences differed somewhat from the boys’, as they did not raise the issue of discrimination or othering in school. Rather, cultural expectations regarding girls’ position in the Cigano society marked their transition narratives. Gabi explained that she was forced by her father to leave school in 8th grade to marry (at age 16). She described her father’s gendered upbringing as the following:

For him, I [should have] stopped at 5th grade. He thinks that being able to read, write, and count is good enough for a girl. But with my brother, he was different. He supported him and encouraged him to finish secondary school.

Gabi expressed disappointment in leaving school and wished that she had been able to continue her studies. She also connected her dropout to an abrupt end to childhood: “I wished I could have been a teenager....I went from childhood to adulthood.”

Contrary to Gabi, Katia said: “I hated school, but I kept going to keep the state benefits.” She talked about how embarrassed she felt being 16 years old and studying with younger children. Katia perceived early school departure as the right thing to do. She asserted: “I don’t want my baby girl to continue to study beyond 9th grade. I want my child to have the same destiny as me,” meaning leaving school to marry. For Katia, the more time a girl spends in school, the more likely it is that she will be sexually active outside marriage. She explained that this is not tolerated; a woman must be a virgin when she marries. In addition, in her mind, school attendance increases the chances of a girl encountering a non-Cigano adolescent, also strongly discouraged by the Cigano community. According to Bruno, his parents reasoned in similar ways, as his sisters were not allowed to continue education when reaching 16: “At 16 girls have to be with their parents, so they won’t bring a bad reputation and shame to the family.”

Ines, however, followed a different educational trajectory, more in line with mainstream culture and values. Ines considered herself *paya*—an outcast—for acquiring certain habits and customs that are in line with non-Ciganos, such as continuing studying and interacting mostly with non-Ciganos. Ines believed this is atypical in Cigano communities. Her decision to continue her studies instead of marrying brought disappointment to her family, she explained, being accused by her mother and grandparents of disrespecting Cigano traditions. Despite being encouraged to quit schooling, she began to explore other social realities beyond Cigano communities in 5th grade: “I got to know other people who weren’t Ciganos, I started to read...things that I hadn’t read before.” She continued: “I started to interact more with teachers, and they influenced my way of thinking, and they somehow made me wonder: Why shouldn’t I continue to study? That there isn’t any harm in doing so.”

### 5.2. Childhood and Adolescence as Preparation for Marriage

As seen concerning education, preparation for marriage was a vital component in a girl’s upbringing. Both Gabi and Katia described learning different household activities from early on to avoid problems with their future husband and in-laws. Katia, who married at the age of 14, said this preparation allowed her to become a

“good woman, good mother, and a good daughter-in-law.” Raising a daughter herself, Katia stated that she wants her daughter to leave school early to marry, continuing: “But instead of marrying at the age of 14, I want her to marry when she is 17.”

Ines, however, refused to follow the path taken by her younger sister and other family members who married at the age of 14 or 15. She anticipated being constrained when getting married: “As long as I am in my mother’s house, I can do and live as I like....I can’t have *paya* habits when I go to my in-laws....I must listen and obey.” In her view, having been raised by a single mother (her father left when she was 10 years old) allowed her a certain degree of independence and *paya* lifestyle. Ines spoke about attempts at negotiating her future, as she said she neither wants to marry nor leave her mother’s house. This seems to have allowed her to continue her studies.

The gendered expectations towards Cigano boys in adolescence were also connected to preparation for marriage, however with a different focus. The boys’ upbringing concentrated on learning how to support their future family and become breadwinners. In the focus group discussion, the boys described being taught by the elders in the family collective how to negotiate and exchange goods from an early age. Rui said that at the age of 11 to 12 they were expected to help with their father’s business, as a way of learning “the malice of life’s cruel ways,” referring to the development of survival strategies.

The gendered expectations regarding preparation for adulthood and marriage were deeply entwined with the socio-spatial radius of girls and boys in their adolescence. While the girls were prepared for domestic tasks and roles, the boys learned how to navigate public space socially as well as spatially. As Bruno said: “For Ciganos it is worse to be a girl than a boy because a girl can’t go out as a boy does. If she does, she will bring a bad reputation.” Since public space is perceived as threatening to girls’ virginity (“purity”), at the time of marriage, they have, according to Bruno, “to stay at home” and, in the words of Rui, be “in charge of the house.”

Restricting the socio-spatial radius of girls circumscribed their social lives and reduced their chances of meeting a non-Cigano partner, in the same manner as leaving school early, as mentioned above. The participants explained that they are expected to have intra-ethnic marriage and find a spouse within their own community. If not, the family is looked down upon and loses respect in the community. As Katia reflected: “If my baby girl ends up marrying someone with a different ethnic background, I will kick her out of the house.”

### 5.3. Finding Livelihood Possibilities at the Margins of Society

The young participants expressed a sense of economic responsibility towards their families and revealed creativity regarding how to get by. Katia occasionally participated in informal vending activities. Although she

initially wanted to work in a nursery, Katia reasoned that her educational background prevented her from securing such a job. However, she complained that her vending revenue combined with child benefits and RSI was not enough to provide for herself, her husband, and their daughter. Thus, she depended on financial help from her mother and mother-in-law. Gabi did not receive any family allowance or child benefits and thus aspired to complement her domestic work with formal work. Despite lacking experience in income-generating activities, she reasoned that she might find a job as a cleaner. She expressed disappointment that neither her father nor husband allowed her to work, indicating strong gendered roles, responsibilities, and power hierarchies within the family.

Despite having a bachelor's degree in social work, Ines explained that securing a job turned out to be difficult: "I graduated last year and since then I began looking for a job [as a social worker], but all my applications have been unsuccessful. I haven't even been called for an interview in any place I applied." Due to family obligations and having to support her mother who had health issues, she sought temporary employment as a hotel housekeeper: "I had to consider any kind of job because my mother isn't very well. I can't sit back and wait for the job I really want." Ines remained optimistic and anticipated that continuing her studies and completing a master's degree would make her "more attractive to the labor market."

For the boys in the study, livelihood prospects were somewhat different. Some of them were employed as mediators, a job relatively common among Ciganos, liaising between the Cigano communities and mainstream society. For Rui, the job as a mediator was seen as an opportunity that allowed him to develop valuable skills and experiences and finish high school. He wanted "to be somebody in life" and dreamt of "becoming a banker." Some expressed that despite securing a mediator position, where their ethnic background was found valuable, they still experienced prejudice. Bruno, for instance, explained: "The problem is when we tell them how to deal with the kids [Cigano children], they ignore what we say. They don't listen to us. But we know how Cigano kids work, they don't."

With a low level of education, difficulties in accessing the formal job market, and money problems, Miguel and David searched for income possibilities at the illegal margins of society, reporting to engage in drug trade. Miguel described how he had to financially support his pregnant wife, grandmother, and father who was recently released from jail. He dreamt of investing his income in a business or buying a house but reasoned that "the money...from selling drugs is only enough for food and accommodation."

## 6. Discussion

The empirical material provides insight into how transitions to adulthood may unfold in contemporary Cigano

communities in urban Portugal. The study reveals a series of school experiences and perceptions, heavily influenced by the youths' ethnic identity and gender. The boys experienced being "othered" in two ways, both by being discriminated by teachers and by not finding relevance in formal schooling, which follows the study of Smith (1997). In addition to an aversion to the level of theorization of contemporary schooling, they also found that their culture and history were made invisible and insignificant in the curricular activities. Despite this, the boys completed more schooling than the girls, supporting findings in previous studies with young Ciganos in Portugal (Magano, 2010, 2017; Mendes & Magano, 2016; Mendes et al., 2014). Magano (2017) also found that Cigano men provide different reasons for not completing compulsory education, often stressing personal choice rather than a parental decision.

In the girls' transition narratives, a diversity of mindsets concerning education emerged. In Gabi's case, she not only wished to continue schooling but also perceived attending formal education as a crucial part of adolescence. Having been denied this opportunity by her family, she reckoned that she had "lost" her youth. This social construction of youth rests upon a normative understanding aligned with mainstream society, where continued schooling is seen to provide breathing space between childhood and adulthood, prolonging the period without heavy family responsibilities. Ines, who was able to continue studying, perceived the school venue as a place to expand her social, educational, and cultural horizons—a place where she could explore and develop her *paya* identity.

Katia, on the other hand, regarded schooling as dreadful, as a necessary evil to obtain state benefits. Her viewpoints aligned with traditional Cigano values and worldview, where the school arena increases the risk of girls encountering non-Cigano boys, seen as a threat to the preservation of female virginity. The girls' educational trajectories were heavily influenced by gendered expectations concerning family obligations and marriage, seen as a key transition to adulthood by most of the participants. This is in line with previous research, stating that when young Cigano girls reach puberty, the family becomes more protective (Magano, 2022). The socio-spatial and temporal freedom is seen as contagious and dangerous, threatening the "purity" of girls who spend time with non-Ciganos (Magano, 2022; Mendes et al., 2014). In Magano's (2022, p. 4) words, "the goal of preserving virginity until marriage makes her a hostage to the family, preventing her from prolonged schooling or professional undertakings outside of the domestic sphere."

How girls and boys were socialized into—and prepared for—their future roles as husbands and wives were highly gendered and anchored in Cigano cultural norms and customs. While the girls learned about domestic tasks and trained to be "good" wives, mothers, and in-laws, the boys were taught how to economically

sustain the family by seizing monetary opportunities available in society. This echoes Magano's (2022) findings that the Cigano family has a crucial role in preserving gender-based traditions regarding marital commitments, even if this conflicts with schooling. Magano reminds us that family pressure makes it hard to reject Cigano values and expectations. Bearing in mind the patriarchal nature of Cigano culture, the absence of Ines' father seems to have provided her more leeway in choosing her life trajectory.

Their gendered roles also had a great impact on their livelihood trajectories. Earning a living entailed drawing on whatever resources available, ranging from social benefits to formal employment whilst barriers encountered included internal cultural and gendered perceptions and structural discrimination in both the educational system and the job market (see also Magano, 2017). Many participants expressed being challenged by needing formal education and skill training to find work due to the growing social division of the labor market in contemporary Portugal. All the girls expressed a wish to contribute to the family economy, yet their options varied. Although Cigano female labor force is of utmost importance to the survival of the family (Mendes et al., 2014), their role remains tied to—and valorized for—tasks conducted in the domestic realm (Magano, 2022). This often results in a situation where the women are overburdened (Mendes & Magano, 2016). In this study, both Katia and Gabi had extensive domestic tasks. While Katia sometimes also took part in vending activities, Gabi's family denied her access to income-generating activities. Cigano women's obedience to male authority is not often questioned, and it is internalized from an early age as necessary for group cohesion and harmony (Lopes, 2008). Women questioning or rejecting traditional roles risk family conflict or being cut off entirely (Magano, 2010), such as seen in the case of Ines, who studied and participated in the formal job market despite her family's disapproval.

With limited school and work opportunities, three boys in this study viewed their job as mediators as the most feasible gateway to formal employment. Although Cigano mediators are seen as important to bridge the gap between Cigano communities and mainstream society (Magano & Mendes, 2021), some of the young mediators reported experiences of exclusion and discrimination. Two boys also engaged in livelihoods that are deemed "immoral" by society. As such, this study differs from the findings of Mendes and Magano (2016) in that not all Cigano participants worked in the formal labor market. Being involved in the drug trade, Miguel and David were acutely aware that livelihood choices are not neutral but engender processes of inclusion and exclusion. Their unconventional livelihood choice conflicted with mainstream society, reinforcing their positions as socially excluded (see Ursin & Abebe, 2017). Rather than perceiving certain livelihoods as marginalized, these livelihoods must be seen as emerging in marginalized con-

texts, acknowledging the socio-cultural, economic, political, and historical conditions that keep some Cigano youth at the margin. Although most literature and policymaking deem involvement in unconventional livelihoods as failed or unfulfilled transitions, it is necessary to decouple the link between adulthood and the formal labor market (van Blerk, 2008) and recognize it as alternative transitions to adulthood (Ursin & Abebe, 2017).

The empirical material suggests that the socially constructed character of both education and work should be renegotiated and reconstructed. Rather than taking for granted that education equalizes formal schooling, this study suggests that informal education and intergenerational transfer of skills and values among Ciganos are important for success in entering adulthood. Furthermore, informal education—in relation to involvement in both domestic tasks and vending—is difficult to discern from contributions to informal work. At the same time, formal schooling is seen, in the case of Katia, as work, earning state benefits due to her school attendance.

The transition narratives of these youths stand in contrast to normative understandings of youth and young adulthood, and their transitions are often rendered "deviant" by normative understandings. For instance, while early marriage, teenage pregnancy, and school dropout are commonly perceived as "social problems," several of the participants see these as both necessary and normal in order to enter adulthood. Furthermore, research and policy on youth transitions in the Global North have tended to conceptualize the school-to-work transition as consisting of two chronologically separated domains, based on the assumption that young people do not work while they study and that schooling results in relevant employment. For the Cigano youth in this study, this dichotomy is problematic as all participants had been working since childhood, combining schooling with domestic or remunerated activities. Hence, the engagement in (remunerated) work does not function as a definite "marker" of adulthood. In addition, the imagined move from dependence to independence, either relationally or economically, does not materialize for most young Cigano adults, as their social life and culture rest upon a deep state of intergenerational interdependence. This is seen in how young people depend on their parents and in-laws, and the other way around, in the case of Ines' sick mother.

Within transition studies, marriage is seen as having lost its key function as a marker of adult status (Arnett, 2007), yet among many of these Ciganos marriage was perceived as a cornerstone in becoming an adult (see also Magano, 2022). In fact, great parts of their childhoods and youth revolved around preparation for married life when they are expected to work, take care of each other, and raise children of their own. This also highlights the longitudinal character of transitions and shows that vital transitions occur throughout the life course of most Ciganos, in their childhood, present being, and

future becomings (Elder et al., 2002). Commenting on the appropriation of normative ideals of what constitute a “normal” youth transition, Valentine and Skelton (2007, p. 105) highlighted that “not all young people either aspire to all of these ‘norms,’ or achieve them in a form that can be measured or acknowledge in conventional ways.” Many young Ciganos living in Portugal will neither achieve nor should be expected to achieve adulthood based on linear and normative notions, as their lives underscore the importance of a “multiplicity of futures” in grasping the complexity and diversity of transitions (Jeffrey, 2010).

The empirical material supports the idea of social age, where age is produced by normative age-based assumptions on how to behave along the life course (Laz, 1998). The study brings to the surface the importance of both ethnicity and gender in the making of social age, where age-based expectations of the Portuguese mainstream society and policymaking often differ from those of the local Cigano community regarding schooling, work obligations, marriage, and childbearing. Most of the participants conformed to Cigano norms, reproducing the “Cigano way of life” (Magano, 2022). However, some questioned prevailing norms, most visibly Ines. In many ways, Ines’ life trajectory is aligned with, and adapted to, mainstream values and political objectives, taking higher education and postponing marriage and pregnancy. Overall, the study thus confirms previous research findings that the degree of importance given to Cigano customs and traditions varies among the young generation of Ciganos (Magano, 2022; Mendes & Magano, 2016).

In relation to this, the importance of young people’s linked lives (Heinz, 2009) in molding their transition experiences also becomes apparent. The relationships in which their lives are embedded provide strong expectations, structural benefits and barriers, and degrees of leeway to their own agentic behavior, ranging from feeling in charge of major life decisions to being subject to social pressure. This is, for instance, seen in the case of formal education, where Gabi wished she had continued studying while Ines remained in school despite her family’s disapproval. In most cases, family and community seem to form the basis of their linked lives, being the dominant force in the life choices of youth. This concurs with previous studies on Cigano communities, documenting strong intra-ethnic sociability and solidarity where the family is the keystone (Mendes & Magano, 2016). However, Ines’ trajectory shows how her scope of agency is enacted through resistance to her ethnic background while facilitated by her out-of-community interpersonal relationships. Connecting with supportive teachers motivated her to study within an intercultural social environment that surpassed the Cigano communities. Her trajectory differs greatly from that of her sister, Katia, who remained loyal to the Cigano gendered roles and values, wishing likewise for her daughter. By drawing attention to the formations of linked lives, we recog-

nize the importance of both self-identification (as Cigano or *paya*) and sense of belonging (in the Cigano or the mainstream community) as part of their navigations into young adulthood (cf. Robertson et al., 2018; Wyn et al., 2019).

## 7. Conclusion

Following recent developments in critical youth studies, this study shows the need to focus on individual voices and experiences in unraveling the complexity of the transition experiences of Cigano youth in Portugal. The findings have shown that predominant and normative ideas, values, and norms that tend to focus on one specific transition need to be protracted in order for us to understand their cultural-specific context. Furthermore, the study suggested some of the ways in which gender and ethnicity shape the multiple transitions to adulthood of young Ciganos. We argue that the socially constructed character of youth transitions, including the school-to-work model, should be acknowledged. In addition, both research and policies concerning youth transitions should be more flexible, taking into consideration the different realities and embodied experiences of contemporary youth and embracing social realities and cultures that remain marginalized.

To make sense of local and global policies on increasing school enrolment and its impact on Cigano/Roma youth, it is necessary to balance attention not only to the relevance of learning and suitability of skills for work opportunities but also to young people’s constrained choices, especially for Cigano/Roma girls. Yet, the heterogeneous character of the ways Cigano/Roma youth navigate into adulthood might render it difficult to create valid solutions. To cater for the diversity of youth trajectories witnessed in this study, we suggest that policymakers’ initiatives should be highly context-sensitive and individually tailored, rejecting the idea of “one-size-fits-all.” In addition, policy initiatives need to be wary of cultural conditions as both a resource and a potential barrier in young people’s lives. We propose encouraging Cigano/Roma children and youth to integrate into the formal educational system, thereby enhancing their future chances in the formal labor market, at the same time as they should be encouraged to maintain their cultural heritage. It is crucial for schools to be more inclusive and representative, enhancing a sense of belonging among Cigano/Roma students. This includes having Cigano/Roma history, culture, and music on the curriculum as well as raising teachers’ consciousness about Cigano/Roma culture and the detrimental effects of ethnic discrimination and marginalization.

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### Conflict of Interests

The authors declare no conflict of interest.

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Article

## A Generational Divide? Coping With Ethnic Prejudice and Inequality Among Romanian Roma Transnational Returnees

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### Abstract

Roma people are likely Europe's most discriminated and marginalized minority. In the past years, increasing attention has been paid to their migration to Western Europe and their limited social mobility in their countries of destination. Our article focuses on the "post-return" experiences of Roma and the changes generated by return migration in their communities of origin, a topic largely neglected so far. We build on recent debates around post-return positionality, asking how adult and old Roma returnees experience return. We thus contribute to the growing literature on return migration and lifecourse that distinguishes between the return migration of children and youth, that of adults, and that of older migrants. Focusing on Roma returnees, we employ an understanding of migration not just as a means of generating resources, but also as a learning process where the Roma population acquires new ideas and a sense of agency and dignity. Informed by long-term fieldwork in ethnically mixed localities in Romania (including participant observation and 76 semi-structured interviews), we inquire into the ethnic relations and negotiations between Roma and non-Roma populations. Migration results in a weakening of the economic dependency of the Roma on the non-Roma. In this new context, which is still marred by ethnic prejudice and inequality, we analysed how local interethnic relations were reshaped by the returned Roma's new consumption practices, new modes of communication, and new claims for equality. While adult Roma tend to demand equality and decent treatment, setting in motion a process of ethnic change, older returned Roma tend to maintain more submissive practices.

### Keywords

ethnicity; generational divide; lifecourse; positionality; return migration; Roma; Romania; social change

### Issue

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### 1. Introduction

In this article, we examine the changing positionality of Roma returnees in multi-ethnic settings. Recognized as Europe's most discriminated and marginalized minority (Vermeersch, 2021), increased attention has been paid over the years to the Roma population's social mobility and marginality (Dimitrova et al., 2021). While scholars have assessed patterns of segregation in European cities (Cousin et al., 2020; Tarnovschi, 2012), lasting seg-

regation in schools (Duminică & Ivasiuc, 2013; Rostas, 2012; Zamfir & Zamfir, 1993), education deficits, and prevailing racism (Duminică & Ivasiuc, 2013; Rostas, 2012), there is much less knowledge on how the Roma population reintegrate in their societies of origin upon their return from Western Europe (Anghel, 2019; Toma & Fosztó, 2018). This article addresses this gap, building on existing debates around return migration and lifecourse. We focus on fieldwork conducted in four localities in Romania, home to the largest Roma population in Europe

(Council of Europe, 2012). In contrast to existing studies on marginalized Roma, which portray a rather pessimistic image of their social mobility (Beluschi-Fabeni et al., 2019; Rostas, 2012; Zamfir & Zamfir, 1993), our study offers a more nuanced picture. In this respect, we develop an approach which focuses on differences between generations of returnees, asking how they reposition upon return and how they express their voice. We regard older adults as those above 50 (see Gualda & Escriva, 2014), distinguishing them from adults between 20 and 50 years of age. In some instances we mention young Roma, here referring to younger adults in their 20s. Our study also examines how ethnicity plays out in return contexts and how local ethnic relations are debated upon in localities still marked by strong social divisions between Roma and non-Roma populations.

## 2. Perspectives on Return Experiences, Positionality, and Age

There are different perspectives within the research on post-return positionality and processes of reintegration. Returnees' reintegration is broadly defined as their participation in economic, social, and political life (Kushminder, 2017) and the literature discusses strategies of reintegration distinguishing different categories of returnees. Some definitions discuss modes of reintegration as individual processes (Kushminder, 2017). However, there is a growing awareness that both age and family relations affect modes and processes of return (Ní Laoire, 2008). Migrants experience shifting "desires and capacities" to return (van Houte, 2019, p. 3), which correspond to different stages in their lifecourse, such as childhood, youth, adulthood, or old age (Cerese, 1974).

So far, much of the literature on return focuses on economically active adults and their agency—with their social adaptation and involvement in the labour market being the main focus. A theoretical perspective informed by Bourdieu's (1984) theory of forms of capital helps approach processes of return migration. During reintegration, migrants possess not only financial resources they utilize for reintegration (Hagan & Wassink, 2020) but also social remittances they acquired during migration, such as new ideas and knowledge (White & Grabowska, 2019). They mobilize their social capital, reconnecting with relatives and friends, and getting acquainted with new people to get jobs and create new opportunities for themselves (De Bree et al., 2010). Meanwhile, the notion of transnational return underscores the mutual relationship between returnees' reintegration and their transnationalism (Fauser & Anghel, 2019; White, 2022). Returnees often remain involved in transnational spaces upon return: They combine local and transnational opportunities and circulate between countries of origin and destination (White, 2022; White & Grabowska, 2019).

Many studies on adult returnees debate the role of return migration on development and social change

(Papademetriou & Martin, 1991). In economics, studies look into issues such as returnees' entrepreneurship, wages and wage premiums, financial remittances, and the aggregate economic effects of migration and return (Constant, 2020; Hagan & Wassink, 2020). Others look at returnees as agents of change beyond economic aspects, examining how they use social remittances (White, 2022; White & Grabowska, 2019) and are able to vernacularize—so that new ideas are accepted by their communities of origin (Kushminder, 2017). While returnees are often in favourable positions (Massey et al., 1994), there are also cases where returning is a challenging process (Lietaert & Kushminder, 2021; Markowitz & Stefansson, 2004). For instance, when migrants do not maintain transnational relations with—or do not visit—their countries of origin, they may experience adaptation difficulties upon return. For instance, some migrants retain romanticized notions of their home country without maintaining contact with the actual situation there (Christou, 2006). Such migrants may feel culturally estranged upon their return and may have fewer friends and relatives on whom to rely (King, 2001; Lietaert, 2020). Returnees may also lack social capital and encounter difficulties when they are regarded negatively, for instance, if they are women facing broken ties, marital conflicts, and stigma (Nisrane et al., 2017), or members of discriminated ethnic minorities, such as the Roma (Duval & Wolff, 2016).

The return of elderly people is distinct from that of economically active individuals; for the elderly, purchasing power and quality of life are more important than economic or market opportunities (Klinthäll, 2006; Yaruhin, 2012). As many migrants have a precarious position in the labour market, they may enjoy better living standards if they return at retirement (Yaruhin, 2012). Other studies stress that potential returnees are not among the poorest migrants (Klinthäll, 2006). Family is a decisive factor influencing the return of older migrants. For King et al. (2021), "the location of [adult] children is a critical variable" (King et al., 2021, p. 1210) that determines whether or not pensioners return. When adult children live in countries of destination, older migrants often choose to remain close to them rather than return, while when spouses and children live in countries of origin, older migrants will likely return (Ciobanu & Ramos, 2016). The presence of other relatives in the country of origin, such as parents and siblings, increases the likelihood of commuting between countries rather than returning (Yaruhin, 2012). Finally, the return of the elderly is gendered—while men tend to return (such as in the case of Turkish, Portuguese, and Spanish migrants), women tend to remain in countries of destination and are afraid of losing their independence if they return (Ciobanu & Ramos, 2016).

Studies on post-return experiences show a variety of situations among pensioners (Ciobanu & Ramos, 2016; King et al., 2021). In Spain, Gualda and Escriva (2014) describe the experiences of pensioners returning from

Latin America and other European countries. Their financial situation varied, with men often doing relatively well, some being rich, and women doing less well. Some women returning from Latin America had no pensions and claimed Spanish non-contributory social benefits. Post-return experiences also vary according to return preparedness and how returnees maintained transnational relations over the years. Older returnees to Morocco who had constructed houses and maintained relations with their friends and relatives while they were away enjoyed living there, while adults who had not prepared for their return were in a more precarious situation (De Bree et al., 2010). Nostalgia and a sense of belonging are important “return motivations” for people of age, especially among cultural traditionalists (Razum et al., 2005). This sense of belonging alone does not however assure a secure lifestyle upon return. Migrants that have false images of their countries of origin may complain about diverse issues upon return, including noise, quality of services, and local norms of social conduct (Gualda & Escriva, 2014). They may also become solitary, refraining from participation in social clubs and gatherings (Barrett & Mosca, 2013; Gualda & Escriva, 2014). Finally, health and lifestyle shape the return motivations and experiences of older returnees. People may return for health reasons—especially when they relate the notion of health to a certain lifestyle and pleasant climate (Razum et al., 2005). However, precarious health and severe diseases can also hinder one’s return as people tend to benefit from a better healthcare system in countries of destination (Ciobanu & Ramos, 2016; Razum et al., 2005). One way to combine the benefit of both a better climate (Klinthäll, 2006) and access to quality social services is to maintain mobility during retirement, as is found among Turkish returnees from Germany and the Netherlands, Italians from the UK, and Moroccans from Belgium, France, and the Netherlands (Razum et al., 2005). Mobility is also more important for returnees coming from countries in which entitlement to social services is conditional upon a certain number of months per year lived there (such as France, Switzerland, or the Netherlands; see Ciobanu & Ramos, 2016).

Studies on children and youth reveal other types of post-return experiences. Although we do not analyse child returnees, this type of return is worth mentioning as it further demonstrates the variation of return experiences in different life stages. Children return when families return (Despaigne & Manzano-Munguía, 2020; Hernández-Léon & Zúñiga, 2016; Vathi, 2016). Parents may also justify their return as conducted for the sake of their children—for them to benefit from better educational or professional prospects (Hernández-Léon & Zúñiga, 2016; Lee, 2016), to be in a safer environment, or enjoy an “innocent childhood” (Ní Laoire, 2011). Families may also return to prevent children from entering into gangs or criminal activities (Zúñiga & Hamman, 2015), or to discipline them (Lee, 2016). Studies focus on children in their teens (Cena et al., 2017), underscoring that they

often experience return as a rupture (Cena et al., 2017; Hernández-Léon & Zúñiga, 2016), especially when they are older than fourteen (Vathi et al., 2016). They go to school in a new country and lose their former friends (Vathi, 2016), as well as the material comforts to which they were accustomed (Cena et al., 2017). School systems usually do not provide for the needs of returned children (Despaigne & Manzano-Munguía, 2020), who have to instead adapt to the existing curricula, while their extra abilities—such as bilingualism—go unrecognized (Despaigne & Manzano-Munguía, 2020; Hernández-Léon & Zúñiga, 2016; Vathi et al., 2016). Not all cases display difficulties though: Sometimes youngsters may consider returning as an opportunity to explore their cultural identities or gain maturity (Lee, 2016). There are also cases in which teens appreciate the chance to pursue tertiary education (Kütük et al., 2018), a certain lifestyle (Kütük et al., 2018), and more freedom (Zúñiga & Hamman, 2015).

Accordingly, looking at return from a lifecourse perspective opens up crucial questions regarding how post-return experiences vary with age. In this article we focus on returnees belonging to an ethnic minority—the Roma—looking at how Roma of different generations (above 50, between 30 and 50, and under 30 years of age) reposition themselves in their society of origin. We use the notion of generation as “life stage” (Kertzer, 1983). We consider this distinction between generations significant for the changes experienced by Roma during the post-socialist period. By focusing on the intersection between return migration and ethnicity, we address an important topic that has so far been less analysed in existing research (Anghel, 2019; Tesăr, 2015b; Toma & Fosztó, 2018). Our approach is informed by Bourdieu’s theory of forms of capital (Bourdieu, 1984). We ask how returnees use their social, cultural, and financial capital upon return and look beyond social and economic positions into ethnic and cultural hierarchies, thus examining returnees’ “positionalities”—how they relate to existing local hierarchies and value their own positions (Faist et al., 2021).

In the following section, we first introduce Romanian Roma migration to contextualize our research and summarize our methodology. We continue by analysing the post-return experiences of Roma returnees and how they impact ethnic relations. We conclude with a discussion on processes of return in multi-ethnic contexts.

### 3. Migration and Return of Romanian Roma

There is a broad consensus that the Romanian Roma population makes up the largest Roma minority in Europe (Council of Europe, 2012) and that censuses underestimate the number of this population. Some estimates suggest there were about 1.8 million Roma in Romania in 1992 (Zamfir & Zamfir, 1993). The mobility of the Roma is a dynamic phenomenon. Quantitative studies conducted in 2012 (Duminică & Ivasiuc, 2013; Tarnovschi,

2012) estimated that the percentage of Roma migrants in the total Romanian Roma population was similar to the percentage of the Romanian migrants in the overall Romanian population, with 19% of households having at least one member abroad. These studies also show that Roma migrants went predominantly to Italy, Spain, and France, and that Roma migration is family-based (Tarnovschi, 2012). They also underscore that Romanian Roma migration is temporary in nature (Tarnovschi, 2012).

Structural discrimination and poverty in the home country are considered important drivers of Roma migration (Duminică & Ivasiuc, 2013; Tarnovschi, 2012), with migration seen by many Roma as the sole means to escape poverty (Pantea, 2013). Recent studies conducted in countries of destination explore how migration improves family lives and how new generations adapt to the new contexts (Solimene, 2019). However, Roma migrants often have a difficult integration: They remain marginal to labour markets, have educational deficits, lack skills, and encounter discrimination (Tarnovschi, 2012). They tend to remain disempowered (Marcu, 2019), with young Roma depending on family groups living in improvised camps (Persico et al., 2020), or remaining “a lost generation” of low-skilled vulnerable employees when they obtain employment (Beluschi-Fabeni et al., 2019). However, even in such precarious conditions there emerged new attitudes among the youth in destination countries, including defiance of social norms; for example, Roma youth often refuse to adopt the subaltern behaviour of the older generations in their interactions with non-Roma (Persico et al., 2020).

Some studies address the issue of Roma migration and return in the Romanian context (Anghel, 2016, 2019; Tesăr, 2015b; Toma et al., 2018), but do not focus on its impact on the stages of life of returnees. Some studies suggest that migration leads to improvements in families’ financial situations (Duminică & Ivasiuc, 2013) and success, as they build large “palaces” or construct new houses upon return (Anghel, 2016). They may also arrive back with new foreign cars and spend more time in restaurants, cafés, and bars—behaviours that become noticed by members of the majority, accustomed to the previous deprivation of the Roma. Due to the increased presence of the Roma in these places, members of the majority cease going there, preferring to go elsewhere (Anghel, 2016; Tesăr, 2015b). But other Roma returnees position themselves differently. Some comply with former relations of inequality and accept their marginal positions (Anghel, 2019). In this article, we engage with these studies but focus on how post-return experiences change according to life stage.

#### **4. Methodology: Researching Processes of Return Migration in Roma Segregated Settlements**

The article relies on fieldwork conducted in four multi-ethnic localities in Romania, where the Roma repre-

sent a sizeable ethnic minority: These were two towns (Campeni and Mica) and two villages (Rurea and Crucea), all located in the Transylvania region of Romania. In these localities, the Roma population lives in segregated neighbourhoods. The research was conducted within the framework of different projects where we looked at practices of mobility, remittances, and the social change associated with migration to Western Europe and the return of the Roma. The fieldwork in Campeni was carried out between 2013 and 2021. It was organized in five research periods with a pause between 2018 and 2020. Fieldwork in Mica and the Rurea was carried out between 2015 and 2017. Finally, the fieldwork in Crucea was carried out in the summer of 2021 and January 2022. In all cases, interviews were preceded by establishing rapport and building trust with the research participants (Devault, 1995). This was crucial as we are dealing with many people who have experienced exclusion and discrimination. Key informants were essential in all localities and we established personal relations with them. Interviewees were selected using the snowball technique (Parker et al., 2019). The first author was conducting fieldwork in Campeni together with his toddler and his wife, while the second author is a speaker of Romani. These factors—along with the fact that we never refused an offer of coffee in someone’s house—helped facilitate communication. Interviews were semi-structured and we also relied on participant observation. We assured the anonymity of the interviewees. The main topics addressed were respondents’ pre-migration situation, their migration experiences, remittances and their uses, and ethnic relations. We also asked questions about their relations with the authorities and interviews often covered issues related to local contexts.

We have conducted 74 interviews in total: 27 in Campeni, seven in Crucea, 20 in Mica, and 20 in Rurea. Most (62) interviewees were married; 34 were women and 40 were men. The age structure for women was the following: Nine women were in their 20s, nine were in their 30s, six were in their 40s, six more in their 50s, and four were in their 60s. For men it was the following: one was aged 19, 11 were in their 20s, five were in their 30s, 13 were in their 40s, nine were in their 50s, and one was in his 60s. Although we also talked with children and youth, we do not count them in the sample.

We interviewed 20 persons above the age of 50. In line with other studies (Gualda & Escriva, 2014), we regard those above 50 as old adults. This age distinction represents a divide within the Roma groups as it determines how Roma experienced the post-communist period—those older than 50 had regular employment during socialism, whereas those under 50 were too young. We have also accounted for migration destinations, where five migrants had multiple destinations (towards Germany, Spain, Greece, and France), while others went predominantly towards one destination: UK (19), Germany (18), France (7), Austria (6), Hungary (6), Spain (6), Italy (4), and Switzerland (1). Two

were non-migrants. In terms of education, only two persons in Campeni had attended high school. The rest had attended a maximum of eight classes. Only six persons in Campeni had regular employment in Romania, two were entrepreneurs, and one was a pensioner. All the others had no regular employment in Romania. Having this differentiated sample and conducting long-term research in three of these localities (Campeni, Mica, and Rurea) enabled us to grasp the longer-term effects of migration and return.

### **5. Four Localities: Roma Groups and Ethnic Inequality in a Transition Society**

The largest locality in which we carried out research was Campeni. It has about 27,000 people, with a Roma minority of 4,000 and a small German minority of 400 people. Mica has around 10,000 people, with about 56% Romanians, 30% Hungarians, and 14% Roma; Rurea has around 3,100 people, half of which are Roma, 1,000 of which are Hungarian, and the rest are Romanian. Finally, Crucea is a village of about 1,500 people, with a Romanian majority alongside about 300 Roma and 100 Germans and Hungarians. All the localities went through a dramatic post-socialist transformation. During state socialism, most people in towns worked in the local industry, while in villages they had mixed employment in industry in nearby cities and agriculture in the socialist cooperatives.

The Roma were among the first to lose their jobs in the years after 1989 when socialism collapsed and later became dependent on the work offered by the non-Roma. They also obtained casual and poorly paid employment in agriculture, construction, and other informal activities, including gathering scrap iron, plastic, or glass. Campeni is the only locality that developed significantly after 2000 and reindustrialized. There, the employment situation improved due to massive foreign investments. Some of the Roma found employment in the new textile and leather factories, but they were poorly paid. Most of them lived in a segregated quarter that grew in size over the years. In Mica, the formal employment of Roma is very low, with most living in two areas on the outskirts of the town: one is near the garbage dump, while the other is a mixed neighbourhood with social housing blocks for the poor Roma. In the villages of Crucea and Rurea, Roma usually work in agriculture as daily labourers for their Romanian or Hungarian neighbours. In both places, they have no land property and lived in small segregated settlements. Roma settlements in these localities offer improper living conditions, and, with the exception of Mica, have no paved roads. Roma also complained about discrimination in the labour market and concerning the authorities, including in local social services, schools, and hospitals. Only in Crucea do authorities and the non-Roma consider the Roma as equal local residents, aware that they form the majority of the local youth.

Beyond this general picture, there is a variation in how adults and older Roma experienced the post-socialist transformation. Many older Roma, who in the 1990s were in their 20s and older, had some degree of socialisation in the socialist labour markets. For these generations, the previous regime offered some sort of stability and assured a clearer transition from youth to adulthood by incorporating them in larger numbers into poorly paid but stable jobs. For younger generations, who were in their teens when socialism collapsed, this was no longer the case. The post-socialist period brought about massive unemployment and high uncertainty among the Romanian youth in the first two decades after 1989 (Horváth, 2008). For the young Roma in our study, this period most often meant poverty and enhanced marginalization. Most of them had limited formal education and hardly any opportunities in the labour market.

Patron–client relationships were found in all localities. In Campeni, Rurea, and Crucea, Romanians and Hungarians developed patron–client relationships with older Roma that offered some economic and symbolic advantages to the Roma. In this way, the Roma families could access informal work and credit from non-Roma, while the latter could count on their workforce. For instance, Anca, a Romani woman from Campeni, lost her job in the textile industry just after 1989 and had no formal employment afterwards. Neither did her husband, Petre, who was employed randomly. Having to provide for four children, Anca would go and beg for food and clothes in town, but when she was employed by Romanians, she was able to obtain money to buy these things for her family. In some cases in Crucea, Roma recollect doing agricultural labour for Romanians, often, according to interviewee Dumitru, “only to receive food for their work.”

Even in cases when the Roma had formal employment, they often also entered into informal labour relations with Romanians. For instance, Ioana worked in the textile industry and one day her employer asked her to clean her home. Ioana felt compelled to accept, so she started working regularly for her boss. Similar situations were common in all localities in which we conducted research. Non-Roma either interpret their use of Roma work as charity towards them (“they give them work to do out of pity”) or suggest that they give food or used goods to the Roma without demanding anything in return—completely obliterating from their accounts the services performed for them by the Roma. These arrangements were always informal and involved many other kinds of transfers (material and symbolic) between the families. In several instances, these patron–client relations engendered more contact between Roma and non-Roma and were thus not only forms of exploitation, but also rapprochements. For Roma youth and adults who do not have a long history of dependence and who can access labour opportunities abroad, such relations are called into question. As Ecaterina, one of our Roma

interviewees in Campeni, argued: “It does not matter if I am a Roma or not; if I want to work why do they treat me like that?” In less economically developed places, such as Crucea, young and adult Roma continue working for Romanian households, although much less than a few years ago: Many have started working abroad in agriculture instead.

## 6. A Generational Divide: Return Migration and Changing Ethnic Relations

In this section, we analyse how migration and return migration developed in these Roma settlements and unpack the changes that these processes produced for the Roma in terms of ethnic relations. In the context of Romania’s accession to the EU, migration developed in all localities. In Campeni and Mica, the Roma went to many European countries: France, Germany, Italy, Spain, and the UK. They employed temporary and long-term migration practices. One main difference between adult and older generations is in their migratory practices. While older Roma tend to employ more temporary practices and keep their employment relations in Romania, adult and young Roma tend to rely more on employment abroad. Part of the Campeni Roma settled abroad, especially in France. The Roma from Rurea and Crucea started to work seasonally in agriculture in Germany. Both these processes of mobility offered better-rewarded working opportunities than could be found at home. Thus, our fieldwork sites underwent two major transformations: (a) the broad processes of social and economic transformation from communism to capitalism leading to Roma impoverishment and their growing dependence on the non-Roma population, and (b) the development of international migration that had opposite effects. A series of changes in ethnic relations were brought about by migration. We have identified new patterns of consumption where the Roma display their wealth, changes in local styles of communication, and finally changes in Roma positionality and more claims for equality.

### 6.1. *New Consumption Patterns and the Display of Wealth*

When migration developed, many Roma living in poor and segregated settlements were able to afford more, including better food, electric appliances, new cars, and better living conditions. A large part of remittances went into refurbishing or constructing houses. In Crucea, Mica, and Campeni, some Roma families decided to move outside the Roma settlements into non-Roma neighbourhoods. In Rurea, some moved into the central part of the village acquiring old peasant houses and renovating them. The style, colour, and materials used for the exterior differ from the traditional style of the village. The internal decorations and household appliances display middle-class aspirations and are often commented on approvingly by members of the local majority. A sim-

ilar but less visible process of residential desegregation has also occurred in Campeni.

The construction of new houses is more salient in Mica, where some mobile Roma families have bought old houses and plots in the centre and built three- or four-storey buildings with shiny roofs that the locals call “Gypsy palaces.” These big houses signal successful mobility but also challenge local social hierarchies that historically deemed Roma marginality as natural. While in some cases these “palaces” remain unfinished (or even unfurnished) constructions that are uninhabited for most of the year, they still signal the presence of mobile Roma that cannot be ignored and marginalized anymore.

Due to the increase in purchasing power, a couple of local shops and bars were opened within the segregated community in Rurea, while in Campeni, Mica, and Crucea the Roma began to frequent more pubs and shops outside their settlements. In Campeni, Roma youngsters and young adults would go gaming in local pubs. With the onset of migration, some went there more often than before. Gaming flourished and Roma thus became more visible. Young and adult returnees to Campeni had also acquired new cars that were in stark discrepancy with their previous poverty. These consumption patterns are similar to those mentioned by other researchers (Anghel, 2016, 2019; Tesăr, 2015b; Toma et al., 2018) and signal the new status of some adult Roma. Older returnees instead invest their funds in housing interiors, which is not such a visible display of wealth. It is important to note that social distance between Roma and non-Roma is not necessarily diminished by Roma’s success and mobility: Its display often receives moral critique and accusations of various forms of criminal activity, trafficking, or defiance of the law. In contrast to many other cases in migration studies where migrants gain social status and prestige by showing their success—as is the case with Romanian migrants in other contexts in Romania (Anghel, 2008)—the continued segregation and disparagement of Roma returnees demonstrates the ongoing salience of ethnicity in relations between Roma and non-Roma.

### 6.2. *New Styles of Communication*

Another change occurs in patterns of communication. During a conversation in Rurea, an elderly Hungarian woman said that “foreign Gypsy youth” are on the streets. She did not fear them or object to their presence, but she complained they did not know how to greet her. These were young Roma returnees to the Romani settlement who went to the UK and returned after a couple of years. In everyday interactions, they were perceived as being from outside the village due to their new style of clothing and behaviour. This type of perception of “foreign youth” among the local majority indicates that the older patterns of local relations, everyday exchanges, and communicational styles are under transformation. The example of linguistic skills and language use is a

good indicator of this process of change. In the same village of Rurea, the older Roma have good competence in Hungarian, the language of the former local majority. They are also well-versed in polite Hungarian forms of greetings and addressing the different age-graded categories between the locals. In the village, proficiency in Hungarian was previously seen as a way to be regarded more positively by the former Hungarian majority. While widespread among older generations, the knowledge of the Hungarian language is only present in exceptional cases among the younger generation, who instead grew up abroad and are more often proud of being able to speak good English or Spanish.

### 6.3. *Changing Positionality and Claims for Equality*

Roma population change their social positioning upon return. They may challenge inequality, comply with it, or try alternative strategies to cross ethnic boundaries (Anghel, 2019). We found direct challenges in the case of the adult returnees, especially when they openly complain about discrimination. In one case, Costel had migrated to Germany and, after a few years, opened business activities in construction and got involved in local politics. He became a local councillor and was struggling, with partial success, to improve the living conditions in the Roma settlement. Bitterly arguing against discrimination in a relatively rich town, he claimed that the majority was not interested in the Roma. Other examples of challenges include Roma being able to construct houses in the centre of their localities, or when they complain strongly about prevailing negative stereotypes. Ion, a Roma man returning from the UK, bitterly recalled his encounter with one clerk of the local municipality:

I went to the office to renew my ID and went from one office to another....I asked to talk to the person in charge....One came and shouted at me....When they talk to us they don't talk nicely, as we are Roma.

We found similar statements and attitudes among the adult returnees, most of whom no longer follow local patterns of dependency vis-à-vis Romanians and Hungarians, preferring to remain mobile and migrate temporarily instead of accepting subaltern and low-paid positions.

Roma adults returning home were also vocal when comparing the attitude of Romanian and West European authorities. Like Ion, many expressed disappointment at how Romanian authorities treated them. In another interview in Campeni, Ana remembered that she was pregnant in France and she recalled that she was treated nicely. She regrets that she did not remain there to give birth. Meanwhile, Carla was proud when her son was nominated among the best at the school in the UK. She thought that nothing of the sort could have happened in Romania. In other cases, adult returnees remember the solidarity and support they received in their countries of destination. This inspired some to

attempt to change the situation at home, but others expressed no hope for change, instead opting for permanent migration—as it was with Nicu who returned temporarily from Spain a few years ago. He decided to leave Romania altogether, remembering that in Madrid he had many friends and their relations were very good.

As we have described, adult returnees to Campeni were keen to voice their discontent and attempted, through various means, to improve their social position. They reacted more openly to discrimination and complained about prevailing racism. They were also more inclined to continue migrating temporarily or to leave Romania for good. In other localities, such as Crucea, where anti-Roma attitudes were not so strong and the Roma youth and adults migrated seasonally, they complained less about racism and more about lacking well-paid jobs at home. In contrast to the youth and adults, who often tended to remain abroad for longer periods, older returnees usually employed temporary migration practices and many of them retained employment in Romania. For them, open criticism was not an option and they instead attempted to facilitate a smoother change in their relationships with the non-Roma. Maria and Ion are two older Roma persons who work temporarily abroad, Maria in Germany and Ion in Spain. They forged new relations with Romanians, as in the case of Maria, who developed new ties with her acquaintances at the school she works at. In both cases they are not open challengers but try to cross ethnic divides by maintaining and multiplying ties to non-Roma, being known as reliable persons. The same occurs with Roma who are able to move outside the segregated areas and who establish relations with non-Roma neighbours or casual employers. Finally, some Roma can obtain formal employment and establish new relations with non-Roma colleagues.

## 7. Conclusion

In this article we built on the growing scholarship on post-return experiences (Kushminder, 2017; White, 2022), specifically focusing on the relationship between post-return experiences and stages of life. While much of the literature is on the return of adult, economically active individuals, increasingly studies look at the differing ways in which return is experienced by people of different ages: children, adults, and older returnees. This article builds on this emerging scholarship and addresses a less researched topic, namely how the return is experienced by ethnic minority returnees of different ages. Even though there is growing literature on the topic of Roma migration and returning (Anghel, 2016, 2019; Beluschi-Fabeni, 2018; Benarrosh-Orsoni, 2019; Pantea, 2013; Tesăr, 2015a, 2015b; Toma et al., 2018), less attention has been paid to how post-return experiences vary with life stage. Similar to other cases of return examined by other studies, mobility remains essential for adult and older Roma. However, in contrast to other case studies with older pensioners—but similar to other

East Europeans (Lulle, 2021)—older Roma migrate and return, needing to work in order to secure decent living conditions in a neoliberal and discriminating context. The post-return experiences of the Roma are shaped by ethnic negotiations and changing relations. We have identified three such changes: (a) new consumption practices, (b) new forms of communication, and (c) open claims for equality. Members of the adult and older generations of Roma embarked differently on these processes. This echoes the findings of existing studies that stress the variation of return experiences with life stage (King et al., 2021; Vathi et al., 2016). Adult Roma are involved in continuous forms of migration and no longer depend on local resources, meaning that they are in a better position to improve their economic standing and consume more than older ones. Young adults also use more foreign languages as they are socialized abroad. And finally, adult Roma challenge more openly anti-Roma discriminatory attitudes. In turn, the older ones do not enter such processes of open challenge and either accept their situation or opt for smoother forms of change, such as establishing new contacts with non-Roma and attempting to cross existing ethnic boundaries. In multi-ethnic settings, it is not just one's life stage but also ethnicity that determines and shapes the modes and processes of migrant return.

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### Conflict of Interests

The authors declare no conflict of interests.

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Article

# Skill Endowment Through Vocational Education and Training Programmes and Early Career Mobility

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## Abstract

This article addresses inequalities in short- and medium-term career outcomes of workers with different vocational education and training (VET) programmes during the early career. In particular, we examine how the degree of vocational specificity of VET programmes affects occupational status mobility throughout individuals' early careers, a topic that has hitherto received little attention. We adopt a life course perspective and combine an individual-level theoretical approach (human capital and signalling theory) with an institutional approach. The former focuses on individuals' skill acquisition during VET and across the early career. The latter emphasises that individuals' allocation to a training programme influences the amount and types of skills they acquire. The multinomial logistic regression analyses are based on a combination of detailed curricula-based occupation-level data on the specificity of training programmes and individual-level data from the Transitions From Education to Employment (TREE) longitudinal dataset. The results show, firstly, that labour market allocation at the beginning of a career has consequences for later labour market outcomes. Second, practical occupation-specific education and training facilitate status stability at labour market entry, while general skills and knowledge are decisive for long-term upward mobility.

## Keywords

dual training; general knowledge; occupation-specific skills; returns to education; vertical mobility; vocational education and training

## Issue

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## 1. Introduction

Education is one of the main institutions that shape life courses (Breen & Buchmann, 2002). Within educational institutions, individuals acquire life course-relevant resources, such as skills, knowledge, and certificates, that influence their hierarchical position in the labour market (DiPrete & Eirich, 2006; Levy & Bühlmann, 2016). Research within the life course tradition has long acknowledged that labour market trajectories are cumulative processes (Dannefer, 2018; Elder et al., 2003). An individual's hierarchical position at one point depends on their previous positions and attainments and is path-

dependent (Levy & Bühlmann, 2016). Education plays an important role in this process, and several studies have found that workers with general education have steeper earning trajectories and higher employment rates in their later careers than those with vocational education and training (VET; see Hanushek et al., 2017; Korber & Oesch, 2019; Lavrijsen & Nicaise, 2017; for contrary results see Malamud & Pop-Eleches, 2010).

However, little is known regarding variations among workers with VET and the impact of VET on long-term labour market outcomes. Swiss VET is well suited to examine this topic, as it is the dominant type of upper-secondary education in Switzerland. Around two-thirds

of all Swiss compulsory school-leavers enter one of the 230 VET programmes at the upper-secondary level. The programmes teach occupation-specific skills and knowledge, along with some general ones (i.e., language, communication, economics, politics, culture, etc.), but the programmes vary highly in terms of the proportion of the taught skills and the manner of their acquisition (i.e., firm versus vocational school; see Eggenberger et al., 2018; Grønning et al., 2020a).

Previous research has shown that this variation of skills and knowledge among workers with VET matters for the match between education and the first job at labour market entry. Workers from highly occupation-specific education and training programmes, especially those with a lot of practical firm-based training that focuses on labour market-relevant and ready-to-use vocational skills, have a better chance of finding a job that corresponds to both their education level and their training occupation compared to workers from more general or school-based programmes that teach higher proportions of theoretical skills (Damelang et al., 2015; Geel & Backes-Gellner, 2011; Menze, 2017; Muja et al., 2019a, 2019b; Müller & Schweri, 2009; Verhaest et al., 2018). This literature stresses that training programmes with high vocational specificity, which provide students with specific vocational skills rather than general skills and knowledge (Bol & van de Werfhorst, 2016, p. 74), can protect workers from entering unskilled work and, consequently, working in a job with lower occupational status than the one they trained for at labour market entry. However, a systematic investigation of how the vocational specificity of training programmes impacts career outcomes and occupational mobility (upward or downward), both from short- and medium-term perspectives, is lacking. Thus, this article contributes to the existing research by investigating inequalities in career outcomes between workers from different VET programmes during their early careers. In particular, we ask how the degree of vocational specificity of VET programmes affects occupational status mobility both immediately after labour market entry and in the medium term.

## 2. Theory and Hypotheses

### 2.1. Status Mobility and VET in Occupationally Segmented Labour Markets

Status mobility describes upward or downward changes in an individual's occupational position throughout their working life (Kalleberg & Mouw, 2018, p. 284). It is embedded in the institutional regulations of the labour market (Maurice et al., 1979). One such regulation is the linkage between educational qualifications and labour market allocation (Allmendinger, 1989; Konietzka, 1999; Müller & Shavit, 1998). In countries where the linkage is strong, the labour market is characterised by occupational subsegments. Access to these occupational subsegments is contingent on an individual's education cer-

tificate. Status mobility in this context most often occurs along institutionalised career lines or "mobility chains" within the occupational subsegment (Sacchi et al., 2016; Spilerman, 1977). Downward mobility can occur either when diploma holders enter a job within the unskilled or semi-skilled labour market segment, such as positions as barkeepers or childminders, or when they enter a job with a lower status than their training occupation within their occupational subsegment (e.g., a car mechanic who works as a truck driver). Upward mobility occurs when a diploma holder finds a job in a related occupation with higher status or gains access to positions with more responsibility (e.g., bricklayers who are employed as foremen). In Switzerland, upward mobility is often contingent on further (tertiary-level) education within the occupational subsegment. For example, trained healthcare assistants can study nursing and become registered nurses. Less frequent in the Swiss context are "jumps" between occupational subsegments, i.e., between a skilled position in one subsegment and a skilled position in another subsegment, because they usually require retraining.

Given our research question of how the degree of vocational specificity of VET programmes affects occupational status mobility at labour market entry and in the medium-term career, we adopt a life course perspective and combine an individual-level theoretical approach, focussing on individuals' skill acquisition during education and across the early career with an institutional approach, emphasising that individuals' allocation to a training programme influences the amount and types of skills they acquire (e.g., Eggenberger et al., 2018; Muja et al., 2019b). In other words, individuals' acquired skills and knowledge reflect the type of skills taught and how these skills are taught. Arguments from human capital theory and signalling theory can in turn explain how individuals' initial skill endowment impacts their further skill development and their short- and medium-term labour market outcomes (Becker, 1964; Spence, 1973). In the following sections, we first theorise how the vocational specificity of training programmes is related to initial allocation in the labour market. Second, we formulate hypotheses on how initial allocation and the different skills acquired during VET may affect medium-term outcomes.

### 2.2. The Relationship Between Training Characteristics and Status Mobility at Labour Market Entry

We argue that the concept of specificity of training programmes has two dimensions: types of skills and manner of skill acquisition. The first dimension pertains to the type of skills taught (general or occupation-specific), while the second concerns how these skills are taught (practically in the training firm or theoretically in vocational school). Training programmes differ in both dimensions. Some, for example, combine a comparatively large proportion of theoretical general education in vocational school with large proportions of

practical occupation-specific training in the firm (e.g., programmes for retail professionals and dental assistants). Others teach comparatively little theoretical general education but a fairly large proportion of theoretical occupation-specific education (e.g., social care workers and healthcare assistants). Many provide mainly practical occupation-specific training and minimal theoretical (general and occupation-specific) education (e.g., automotive technicians and veterinary assistants; see Table A2 in the Supplementary File). An important assumption in this article is that both dimensions of skill specificity, type of skills, and manner of skill acquisition, affect how transferable the acquired skills and knowledge are, how fast they depreciate, and how strongly they facilitate further learning (Estévez-Abe, 2012; Forster & Bol, 2018; Hanushek et al., 2017; Müller & Shavit, 1998).

### 2.2.1. Type of Skills

General knowledge, such as basic academic subjects (e.g., language, economics, ethics) and analytical and problem-solving knowledge, is transferable between firms and occupations and can be used in diverse contexts (Becker, 1964). In contrast, occupation-specific skills are highly relevant for—but limited to—the occupation in which they were acquired (Shaw, 1987). Human capital theory argues that this difference is likely to influence status mobility at labour market entry because the types of acquired skills are relevant to the training costs associated with hiring VET diploma holders. Highly specific, less transferable skills increase diploma holders' immediate productivity and reduce training costs for new job incumbents within the occupation (Hanushek et al., 2017; Müller & Shavit, 1998). Labour market entrants who receive highly occupation-specific training are strongly incentivised to enter employment within their trained occupation, where they can apply most of their skills and where their skills will be fully remunerated (Vicari & Unger, 2020). Those with more general education need more on-the-job training to acquire the same level of occupation-specific skills and productivity (Breen, 2005; Müller & Shavit, 1998; Wolbers, 2003). Employers could react to this by preferring more experienced workers over labour market entrants who are trained in occupations with a high proportion of general education. Labour market entrants with more general education could therefore be at a greater disadvantage against experienced workers than labour market entrants with more specific education and training (Vogtenhuber, 2014). Furthermore, employers might compensate for the higher training costs associated with hiring labour market entrants whose vocational training programmes taught more general knowledge by placing them in positions with lower pay and status. Thus, we hypothesise:

H1a: Labour market entrants who trained in occupations with a high proportion of general education

are *more likely to experience downward mobility* at labour market entry than those who trained in occupations with lower proportions of general education.

H1b: Labour market entrants who trained in occupations with a high proportion of general education are *less likely to enter a first job with the same status as the training occupation* at labour market entry than those who trained in occupations with lower proportions of general education.

H1c: Labour market entrants who trained in occupations with a high proportion of general education are *equally likely to experience upward mobility* at labour market entry than those who trained in occupations with lower proportions of general education.

### 2.2.2. Manner of Skill Acquisition

Comparative research on education system effects implies that the degree of how readily occupation-specific skills can be used after labour market entry and how transferable they are depends on how these skills are taught (for an overview see Blommaert et al., 2020). Occupation-specific skills that are taught in the training firm are closely tied to actual labour market needs and practices, while occupation-specific education that is taught theoretically in vocational schools is more abstract and independent of the state of the art in the firms (Müller & Shavit, 1998; Neyt et al., 2020). Thus, practical training in firms imparts more relevant and ready-to-use specific skills that are crucial for productivity at labour market entry compared to theoretical occupation-specific education (Bol & van de Werfhorst, 2016; Breen, 2005). Those who trained in VET programmes that included a high proportion of practical training should thus be sought after by employers and should easily find jobs that match their training. Thus, we hypothesise:

H2a: Labour market entrants who trained in occupations with a high proportion of practical occupation-specific training are *less likely to experience downward mobility* at labour market entry than those who trained in occupations with lower proportions of practical training.

H2b: Labour market entrants who trained in occupations with a high proportion of practical occupation-specific training are *more likely to enter a job with the same status position* at labour market entry than those who trained in occupations with lower proportions of practical training.

H2c: Labour market entrants who trained in occupations with a high proportion of practical occupation-specific training are *equally likely to experience upward mobility* at labour market entry than those

who trained in occupations with lower proportions of practical training.

### 2.3. The Relationship Between Training Characteristics, Early Labour Market Allocation, and Status Mobility During Early Career

The vocational specificity of a training programme may have both indirect and direct impacts on long-term mobility chances. The indirect impact is mediated by early labour market allocation and the characteristics of the first job. Indirect effects are likely if the concept of cumulative (dis)advantages across the life course is taken into account (Dannefer, 2018; DiPrete & Eirich, 2006). Previous research shows that initial disadvantages associated with status-inadequate jobs or income disadvantages have been found to accumulate across the career (Brunner & Kuhn, 2014; Bukodi & Dex, 2009; Scherer, 2004). In contrast, upward mobility at the beginning of the career may signal high motivation, productivity, and trainability to employers, thus increasing the likelihood of further upward moves. Concerning our research questions, this could mean that occupation-specific and practical skills and knowledge have positive long-term consequences because they facilitate status-adequate labour market entry.

Regarding the direct long-term effects of training characteristics, the vocational specificity of a training programme may affect how likely it is for diploma holders to acquire new skills and knowledge through further learning. Vocational specificity may also affect the probability of losing skills and knowledge as a result of depreciation due to technological changes or times out of the labour market (Hanushek et al., 2017; Lavrijsen & Nicaise, 2017). This assumption can explain why general and theoretical knowledge, which should initially hamper labour market entry, can open up new job opportunities over time and thus compensate for the initial disadvantage.

#### 2.3.1. Type of Skills

Because general education focuses on basic academic subjects and analytical tools that help reflect on individual learning processes (State Secretariat for Education Research and Innovation, 2006; Wettstein et al., 2017), a high proportion of general education and training provides a good foundation for further learning, whether informal or formal, through higher vocational education (Lavrijsen & Nicaise, 2017; Sander & Kriesi, 2021). This can in turn enhance diploma holders' productivity and signal high motivation and trainability (Hanushek et al., 2017; Li et al., 2000). Furthermore, general knowledge hardly depreciates and is highly transferable, because it can be used in various occupations across the labour market and thus also throughout one's career (Estévez-Abe, 2012; Grønning et al., 2020b). More general education may therefore give individuals access to equal- or higher-status positions, even after a period out of the

workforce or in occupational subsegments other than their training occupation. Accordingly, we hypothesise:

H3a: Individuals who trained in training occupations with a high proportion of general education are *less likely to experience downward mobility* during their early careers than those who trained in occupations with lower proportions of general education.

H3b: Individuals who trained in training occupations with a high proportion of general education are *less likely to experience status stability* during their early careers than those who trained in occupations with lower proportions of general education.

H3c: Individuals who trained in training occupations with a high proportion of general education are *more likely to experience upward mobility* during their early careers than those who trained in occupations with lower proportions of general education.

#### 2.3.2. Manner of Skill Acquisition

Theoretical occupation-specific education fosters analytical thinking and provides basic occupation-specific academic knowledge, which is favourable for further learning within the occupational field (Wettstein et al., 2017). In contrast, diploma holders from training programmes with a high proportion of practical occupation-specific training could face high costs of entering higher education because their training programmes have equipped them with ready-to-use practical skills rather than the logic of academic learning. Therefore, these diploma holders might be less inclined to enter further education, which would possibly give them access to higher-status positions than those with more theoretical occupation-specific knowledge. Furthermore, because skills acquired through practical occupation-specific training are related to the tasks and technology of the training firm to a higher degree, practical training could hamper individuals' flexibility, especially in industries with rapid technological change (Hanushek et al., 2017). Thus, we hypothesize:

H4a: Individuals who trained in training occupations with a high proportion of practical occupation-specific training are *more likely to experience downward mobility* during their early careers than those with lower proportions of practical occupation-specific training.

H4b: Individuals who trained in training occupations with a high proportion of practical occupation-specific training are *more likely to work in a job with the same status* during their early careers than those with lower proportions of practical occupation-specific training.

H4c: Individuals who trained in training occupations with a high proportion of practical occupation-specific training are *less likely to experience upward mobility* during their early careers than those with lower proportions of practical occupation-specific training.

#### 2.4. Other Occupation-Specific Determinants of Status Mobility

The occupation-specific labour market situation and the individual characteristics of diploma holders are likely to matter for status mobility. At the occupational level, labour market entry conditions are very important for later career development (Brunner & Kuhn, 2014). In occupationally segmented labour markets, demand and supply within the occupational field are substantially more important for career development than the overall economic situation (Buchs et al., 2015; Sacchi et al., 2016). Thus, the highly aggregated measures of labour market supply or demand (e.g., year or region dummy variables or local unemployment rates) used to control for opportunities in previous research are insufficient (Menze, 2017; Muja et al., 2019b; Vogtenhuber, 2014; Wolbers, 2008). Further, Sacchi et al. (2016) show that individual opportunities are highly contingent on the status distribution of the positions available. Vacant positions with higher status within individuals' mobility chains are a prerequisite for upward mobility. Downward mobility is more likely when more of the vacant positions are of lower status.

### 3. Empirical Method

#### 3.1. Data

We use the first cohort of the Transitions From Education to Employment (TREE) panel study of the Swiss compulsory school-leaver cohort in 2000, who were aged 15–16 years old. The data comprises nine waves carried out between 2001 and 2014. From 2003 onwards, monthly employment spells with information on the job title and characteristics were recorded (Gomensoro & Meyer, 2017). The analyses are based on respondents who finished a dual upper-secondary VET degree with a training duration of three or four years. To test the effect of specificity on status mobility directly after labour market entry we used all VET diploma holders for whom a first employment episode was observed within two years after training ( $N = 1391$ ). The average age at labour market entry was 21 ( $SD = 1.6$ ). The analysis of status mobility during the early career was based on all VET diploma holders who were employed and not in education or military/civil service 10 or 14 years after compulsory school (waves 8 or 9;  $N = 1180$ ). On average, they were 28 ( $SD = 1.9$ ) years old (for details see additional notes and Table A1 in the Supplementary File). Individuals with missing covariate information were excluded from the analyses (81 and 75 individuals, respectively).

#### 3.2. Measures

##### 3.2.1. Dependent Variables

The first dependent variable captures status mobility at labour market entry between the training occupation and the first job. The second variable captures status mobility between the training occupation and the job around the age of 30 (medium-term job). Status mobility distinguishes between three categories: (a) upward mobility, (b) downward mobility, and (c) no status mobility (status stability). The “stability” category consists of individuals who continued working in the training occupation and individuals who changed into an occupation with a status similar to that of their training occupation. The status of an occupation is measured by the International Socio-Economic Index of Occupational Status (ISEI; see Ganzeboom et al., 1992). Upward mobility is defined as an increase in ISEI score of at least 10%, and downward mobility is defined as a decrease in ISEI score of 10% or more, which is in line with the cut-off points set by previous research (Sacchi et al., 2016; Wolbers, 2008). Status stability applies to ISEI increases or decreases of less than 10%. The relative definition of status mobility ensures comparability between respondents' mobility patterns regardless of the status position of the diploma holders' training occupation (Sacchi et al., 2016).

##### 3.2.2. Occupational-Level Explanatory Variables

Previous research measuring specificity focused on either the type of skills or the manner of skill acquisition (e.g., Damelang et al., 2015; Geel & Backes-Gellner, 2011; Menze, 2017; Neyt et al., 2020). Measures of type of skills are either based on self-reported skills or mismatch (Geel & Backes-Gellner, 2011; Menze, 2017), skill catalogues for the occupations (Damelang et al., 2015; Eggenberger et al., 2018; Vicari & Unger, 2020) or expert ratings (Muja et al., 2019b). Measures of the manner of skill acquisition distinguish between school-based and firm-based training (Müller & Schweri, 2009; Neyt et al., 2020). A few recent contributions incorporate both dimensions in a single analysis but use crude dichotomous and static variables only, that do not capture changes over time (Muja et al., 2019a, 2019b; Verhaest et al., 2018).

We aim to exceed previous research by constructing time-dependent specificity indicators that capture both the type of skills and the manner of skill acquisition based on the occupation-specific training content in force at the time the respondents underwent training. This was achieved by using a database of the institutional characteristics of the training occupations, covering around 550 nationally standardised and legally binding occupation-specific VET ordinances and curricula in force between 2000 and 2015 (Grønning et al., 2018). The VET ordinances and curricula include information

on the time apprentices spend in the training firm, intercompany courses and vocational school learning occupation-specific and general lessons. General education is mainly taught in vocational schools and includes lessons in language, communication, economics, business management, administration, politics, ethics, and culture. Occupation-specific skills and knowledge are provided through both practical training and experience in the training firm and through occupation-specific lessons in vocational school and intercompany courses. Intercompany courses provide occupation-specific education and training that is not part of the training in the firms due to safety reasons or firm specialisation. The first dimension of specificity, the type of skills, is measured with a continuous variable that captures the proportion of general versus occupation-specific education. This was calculated by dividing the time the apprentices spent in general education in vocational school by the total training time at all three locations (mean = 9.7, SD = 4.0; see Table 2). The second dimension, the manner of skill acquisition, is based on the proportion of practical versus theoretical occupation-specific training. This was calculated by dividing the time apprentices spent in the training firm by the time they spent in occupation-specific training at all three training locations (mean = 85.5, SD = 2.8; see Table 2). These two indicators were linked to the individual-level data based on the training occupation title (TREE, 2016, p. 8) and the year of graduation.

We controlled for (potentially confounding) labour demand by using the Swiss Job Market Monitor data, providing a representative sample of all vacant positions from 1950 onwards on a yearly basis (Sacchi, 2014). Three indicators capture the annual number of occupation-specific vacant positions that were accessible to diploma holders from specific training programmes: number of job vacancies with 10% higher ISEI scores; number of job vacancies with 10% lower ISEI scores; and number of job vacancies with equal (+/- 10%) ISEI scores compared to the training occupation of the diploma holders. We only included vacancies that (a) requested a VET diploma, (b) did not require any further education, labour market experience, or supervisory experience, and (c) were not aimed at older age groups (Buchs et al., 2015). The number of advertised positions was then weighted by the probability that a “worker with occupation x [was] able to access jobs in other occupations” (Sacchi et al., 2016, p. 14). Thereby, we account for the fact that access to open positions depends on diploma holders’ occupations. Thus, the indicators measure diploma holders’ opportunities for upward, lateral and downward mobility within the occupational subsegment to which their diploma grants access. To account for the supply side, we included the number of unemployed individuals with a vocational degree within the diploma holder’s training occupation based on register data on monthly unemployment counts. These data were provided by the Swiss job

placement and labour market statistics information system. All controls for the occupation-specific labour market situation were z-standardised.

### 3.2.3. Individual-Level Explanatory Variables

To account for the sorting of young men and women into different occupations according to their social backgrounds and abilities, we include several controls. Abilities and school performance were measured using respondents’ PISA reading score (z-standardised) and lower secondary education track (0 = basic requirements, 1 = pre-gymnasia track, 2 = extended requirements, and 3 = no formal tracking). Sex (0 = female, 1 = male), country of birth (0 = Switzerland, 1 = other), region of residence during VET (7 categories), age of the respondents at the time of completion of the apprenticeship, and the presence of children (medium-term models only) were included in the multivariate analysis. The mean parental ISEI when the VET diploma holders left compulsory school (z-standardised) captures family background. Furthermore, we controlled for training firm retention (0 = no, 1 = yes, 2 = missing) and the months between graduation and the first job.

### 3.3. Analytical Strategy

To assess the impact of the proportion of general education and practical training on status mobility, we ran multinomial logistic regressions (Long & Freese, 2014). To compare nested models, we present the average marginal effects (Best & Wolf, 2012), which can be interpreted as the population-averaged marginal effect of the independent variables on the probability of experiencing upward mobility, downward mobility, and status stability. To compute correct standard errors for the occupation-specific variables, we estimated cluster-robust standard errors for the training occupations (Long & Freese, 2014, p. 104). The results are reported using survey weights that correct for the disproportionality of the sample as well as for panel attrition (Sacchi, 2011). Models 1 and 2 in Table 3 pertain to the first job after labour market entry (see also Supplementary File, Table A3). Models 3, 4, 5, and 6 in Table 4 present the results pertaining to status mobility during the early career (see also Supplementary File, Table A4). The predicted probabilities based on Models 2 and 5 are depicted in Figure 1. For additional notes on the variables and analytical strategy, including robustness checks, see the supplementary material.

## 4. Results

### 4.1. Descriptive Results

Table 1 shows the proportion of VET diploma holders who experienced downward and upward mobility in their initial and medium-term jobs. At labour market

**Table 1.** Status mobility between training occupation and first and medium-term job.

	First job	Medium-term job
	Percent	Percent
Downward mobility	10.2	10.1
Status stability	74.0	40.8
Upward mobility	15.9	49.2
Total	100	100
N	1391	1180

Note: Weighted results. Source: Own calculations based on TREE (first cohort).

entry, the majority (74%) of diploma holders found jobs with the same status score as their training occupations. A considerable fraction also experienced upward mobility; 16% found jobs with higher status scores than their training occupations. During the early career, the proportion of individuals who experienced upward mobility rose to 49%. Overall, these results show a favourable labour market situation for young Swiss VET diploma holders. Nevertheless, around one-tenth of diploma holders enter their first jobs with lower statuses than their training occupation. In the medium term, this proportion does not change. Given that two-thirds of Swiss school-leavers enter VET, downward mobility affects a sizeable group.

To provide a first impression of the relationship between status mobility and the specificity of the training occupation, the mean shares of general education and practical training for each mobility group are presented in Table 2. VET diploma holders spent between 6% and 21% of their training time in general education in vocational schools. Thus, most of their training was occupation-specific. On average, those who experienced upward mobility trained in occupations with a significantly higher proportion of general education than those who did not (one-sided *t*-test,  $p < 0.01$ ). This is the case both at labour market entry and around the age of 30. Diploma holders' occupation-specific training is largely practical. Between 69% and 92% of occupation-specific training took place in the training firm. Those who experience upward mobility have a slightly but significantly lower proportion of practical occupation-specific training

than those who did not in a short-term perspective (one-sided *t*-test,  $p < 0.01$ ).

#### 4.2. Multivariate Results

The results in Model 1 (Table 3) show that the proportion of general education is negatively associated with the probability of experiencing status stability and positively associated with the probability of experiencing upward mobility in the first job. However, when the occupation-specific labour market opportunities are added in Model 2, the effects of general education diminish and are no longer significant. The favourable labour market opportunities in training occupations with a high proportion of general education seem to be the reason why the diploma holders in these occupations are more upwardly mobile at labour market entry than diploma holders with more occupation-specific education and training. In summary, these findings confirm hypotheses H1c but not H1a and H1b. We find no evidence that, net of other factors such as job opportunities, the type of skills matters for diploma holders' status mobility between training occupation and first job after the apprenticeship.

The results in Model 1 further show that VET diploma holders who trained in occupations with a high proportion of practical occupation-specific training have a significantly lower probability of experiencing downward mobility and a significantly higher probability of entering a job with a similar status score to their training occupation than those who trained in occupations

**Table 2.** Distribution of the proportion of general education and practical training by status mobility (in percent).

	Downward Mobility		Status Stability		Upward Mobility		Total		Min	Max	N
	Mean	SD	Mean	SD	Mean	SD	Mean	SD			
First job											
General education	10.1	4.1	9.1	3.7	12.4	4.3	9.7	4.0	5.8	21.0	1391
Practical training	84.5	3.1	85.9	2.7	84.4	2.4	85.5	2.8	68.6	91.5	1391
Medium-term job											
General education	9.7	4.2	8.9	3.7	10.7	4.3	9.9	4.1	5.8	21.0	1180
Practical training	84.9	2.8	85.9	2.7	84.8	3.0	85.3	2.9	68.6	91.5	1180

Note: Weighted results. Source: Own calculations based on TREE (first cohort).

**Table 3.** Multivariate results for first job.

	Model 1			Model 2		
	Downward mobility	Status stability	Upward mobility	Downward mobility	Status stability	Upward mobility
Proportion of general education	-0.003 (0.003)	-0.018*** (0.004)	0.022*** (0.003)	-0.005 (0.006)	-0.008 (0.010)	0.013 (0.009)
Proportion of practical training	-0.016*** (0.004)	0.014* (0.007)	0.002 (0.008)	-0.015** (0.006)	0.017* (0.008)	-0.003 (0.007)
Occupation-specific labour market opportunities				X	X	X
Individual level control variables	X	X	X	X	X	X
N		1391			1391	
Pseudo R <sup>2</sup>		0.149			0.158	

Notes: Average marginal effects from multinomial logistic regressions; cluster-robust standard errors in parentheses; weighted results; +  $p < 0.10$ , \*  $p < 0.05$ , \*\*  $p < 0.01$ , \*\*\*  $p < 0.001$ ; for the full models with control variables see Table A3 in the Supplementary File. Source: Own calculations based on TREE (first cohort).

with high proportions of theoretical occupation-specific training. These effects hardly change when we control for occupation-specific labour market opportunities in Model 2. This result confirms hypotheses H2a, H2b, and H2c. With increasing proportions of practical occupation-specific training, the probability of experiencing downward mobility decreases substantially and significantly (H2a) and the probability of experiencing status stability increases substantially and significantly (H2b), whereas the probability for upward mobility is not related to the proportion of occupation-specific training (H2c; also see lower left quadrant in Figure 1). At labour market entry, practical occupation-specific skills seem to offer better protection against status loss by facilitating entry into matching jobs to a higher degree than theoretical occupation-specific skills. These results complement research that shows that those with dual training programmes face fewer problems with labour market entry, such as finding employment (Neyt et al., 2020) and being undereducated or inadequately skilled (Verhaest et al., 2018) than those with more school-based education.

The results pertaining to medium-term status mobility (Table 4, Models 3–6) show that the proportion of general education becomes more important for status mobility over time. Around the age of 30, diploma holders who trained in occupations with a large proportion of general education had a significantly lower probability of being in a job with the same status compared to diploma holders who trained in occupations with a low proportion of general education (Table 4, Model 3). Furthermore, they have a significantly higher probability of being in a job with a higher status than their training occupation. This effect becomes larger when job opportunities at labour market entry are also controlled for (Table 4, Model 4). This suggests that the effect of general education is underestimated because those with a greater proportion of general education faced

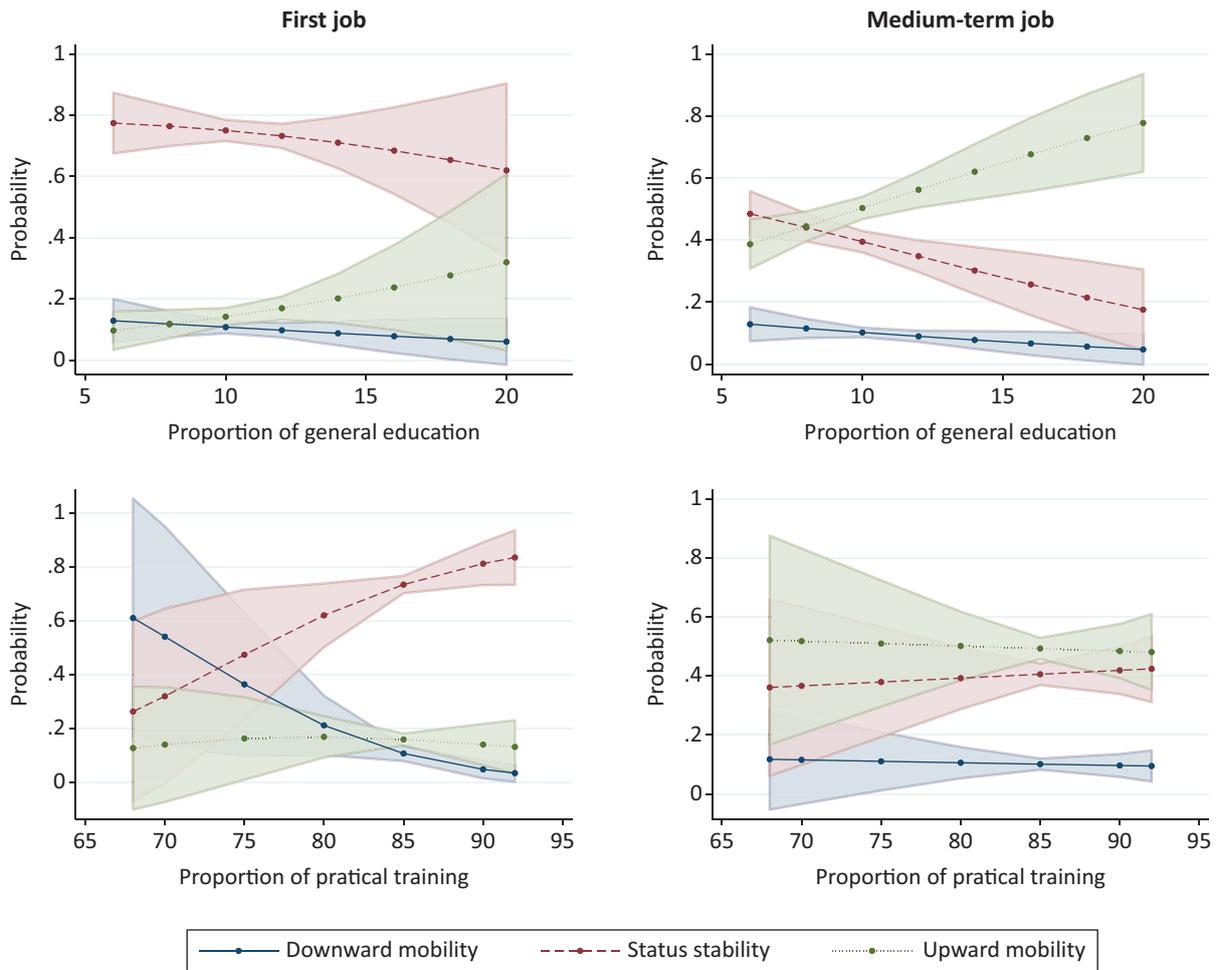
less advantageous labour market conditions when entering the labour market than those with more occupation-specific training and education. In Model 5, mobility at labour market entry is added, which somewhat reduces the effect size of general education. However, the average marginal effects remained significant and substantial. As Figure 1 shows (upper right quadrant), those with the most general education have a 34 percentage points higher probability of being upwardly mobile and a 26 percentage points lower probability of experiencing status stability than those with the least general education. When accounting for further education after earning the VET diploma, the effects remain stable (Table 4, Model 6). These findings confirm hypotheses H3b and H3c but not hypothesis H3a, which assumed that high proportions of general education are related to a lower propensity for downward mobility. Taken together and despite the lack of effect of general education on downward mobility, the results support the assumption that skills and knowledge taught during VET can have long-term effects beyond the initial allocation in the labour market. General knowledge could help compensate for a disadvantageous start because this knowledge depreciates slowly and facilitates further learning. Individuals who trained in occupations with a high proportion of general education could have a more positive attitude towards learning and more frequently attend higher or further education. This can enhance diploma holders' productivity throughout their early career, send positive signals to employers, and therefore make diploma holders with general education better equipped to improve their status position in the medium term.

Higher proportions of occupation-specific practical training are associated with a higher probability of remaining in a job with the same ISEI score as the training occupation, net of individual level controls and initial job opportunities (Table 4, Model 4). However, this

**Table 4.** Multivariate results for medium-term job.

	Model 3			Model 4			Model 5			Model 6		
	Downward Mobility	Status Stability	Upward Mobility	Downward Mobility	Status Stability	Upward Mobility	Downward Mobility	Status Stability	Upward Mobility	Downward Mobility	Status Stability	Upward Mobility
Proportion of general education	-0.001 (0.004)	-0.025*** (0.007)	0.026** (0.009)	-0.009 (0.007)	-0.025* (0.010)	0.034** (0.013)	-0.006 (0.005)	-0.021** (0.008)	0.027** (0.010)	-0.006 (0.005)	-0.022** (0.008)	0.029** (0.010)
Proportion of practical training	-0.006 (0.006)	0.011 (0.012)	-0.005 (0.016)	-0.005 (0.006)	0.020* (0.009)	-0.015 (0.013)	0.000 (0.004)	0.008 (0.009)	-0.008 (0.010)	-0.001 (0.004)	0.003 (0.009)	-0.002 (0.010)
Mobility at labour market entry (ref: status stability)												
Downward mobility							0.427*** (0.052)	-0.241** (0.083)	-0.186* (0.075)	0.412*** (0.053)	-0.248** (0.077)	-0.164* (0.076)
Upward mobility							0.028 (0.033)	-0.410*** (0.049)	0.382*** (0.062)	0.032 (0.033)	-0.400*** (0.050)	0.368*** (0.064)
Individual level control variables	X	X	X	X	X	X	X	X	X	X	X	X
Occupation-specific labour market opportunities				X	X	X	X	X	X	X	X	X
Further Education										X	X	X
N		1180			1180			1180			1180	
Pseudo-R <sup>2</sup>		0.161			0.206			0.342			0.361	

Notes: Average marginal effects from multinomial logistic regressions; cluster-robust standard errors in parentheses; weighted results; +  $p < 0.10$ , \*  $p < 0.05$ , \*\*  $p < 0.01$ , \*\*\*  $p < 0.001$ ; for the full models with control variables see Table A3 in the Supplementary File. Source: Own calculations based on TREE (first cohort).



**Figure 1.** Predicted mobility based on the proportion of general education and practical occupation-specific training at labour market entry and during the early career. Note: Predicted margins with 95% confidence intervals based on Model 2 in Table 3 and Model 5 in Table 4. Source: Own calculations based on TREE (first cohort).

positive effect diminishes and is no longer significant when mobility at labour market entry is controlled for (Table 4, Model 5). Thus, practical occupation-specific education mainly seems to impact medium-term status stability, because it facilitates status-adequate labour market entry. Thus, we found no support for hypotheses H4a, H4b, and H4c. The assumption that more practical occupation-specific training, compared to theoretical occupation-specific education, becomes a burden that leads to status loss or prevents status gain does not hold. The effects of initial mobility on medium-term status mobility are in line with the research finding that initial disadvantages in the labour market accumulate throughout one’s career (Dannefer, 2018; DiPrete & Eirich, 2006). VET diploma holders who enter the labour market in a job with a lower status than their training occupation are more likely to be in a job of lower status around the age of 30 as well, and they are less likely to enter a job of similar or higher status than their training occupation compared to their counterparts who enter the labour market in status-adequate jobs (Table 4, Model 5). Those who experience upward mobility at labour market entry seem

to be able to maintain favourable status positions or even experience further upward mobility.

### 5. Discussion and Conclusion

This article sheds light on inequalities in labour market outcomes throughout the early career among individuals who trained in different VET programmes. It examined how variations in the taught general and specific skills of different VET programmes influence occupational status mobility. This contribution goes beyond current research by systematically differentiating between upward mobility, downward mobility, and status stability at labour market entry and in the medium term. We show that labour market allocation at the beginning of a career has long-lasting consequences. Initial downward mobility is associated with medium-term disadvantages, while initial upward mobility fosters higher-status positions throughout the early career. Furthermore, variations of skills and knowledge acquired through VET matter for individuals’ long-term labour market allocation beyond its effect on the initial occupational position.

The results show that having trained in a programme with a high proportion of practical occupation-specific training prevents individuals from experiencing downward mobility at labour market entry. This suggests that those with highly specific practical skills are likely to become employed in a job in their training occupation, where their skills can be used immediately and are fully remunerated. Our finding is in line with previous research showing that practical occupation-specific training is beneficial for a range of labour market outcomes at labour market entry (Grønning et al., 2020a; Neyt et al., 2020; Polidano & Tabasso, 2014; Verhaest et al., 2018). Because status stability at labour market entry facilitates medium-term status stability and prevents medium-term downward mobility, a high share of practical training can function as a safety net during the first 10 years of a career, securing status-adequate and stable employment trajectories (Shavit & Müller, 2000). This is advantageous for school-leavers who are less academically oriented or weary of school.

For upward mobility in the early career, a large proportion of general education within VET is beneficial compared to a large proportion of occupation-specific education and training. This result suggests that general education fosters further learning activities and a positive attitude towards learning (see also Lavrijzen & Nicaise, 2017), which gives VET diploma holders access to higher status positions throughout their early careers. If this interpretation holds, general education taught in VET is able to compensate for early disadvantages at labour market entry.

On a theoretical basis, our results confirm that labour market careers are cumulative processes, with education as a crucial life-course relevant institution that shapes not only individuals' school-to-work transition but also their long-term career outcomes. Even within education levels, as illustrated in this article by upper secondary VET, allocation to training or education programmes has an impact on individual skill and knowledge attainment, as well as skill development, throughout the early career. Future theoretical considerations should focus more on these differences in the types of skill acquisition and skill development within levels of education, as they have implications for life-course inequality, especially given the fact that access to different training and education programmes is driven by social origin to a high degree (Meyer & Sacchi, 2020). Moreover, the important interplay between skill endowment, initial labour market allocation, further skill development and long-term mobility is still scarcely studied, both theoretically and empirically.

Our results contribute to the current debate on how VET can keep up with increasing skill requirements due to rapidly developing technology and the shift to non-routine tasks with high skill requirements (Oesch, 2013). The debate centres on the trade-off between meeting the increasing demand for tertiary-educated workers and continuing to provide enough

vocationally trained workers with sound occupation-specific skills and knowledge (Euler & Severing, 2017; Kriesi & Leemann, 2020). Along with other recent empirical research (Forster & Bol, 2018; Hanushek et al., 2017; Korber & Oesch, 2019; Sander & Kriesi, 2021), the results of this study suggest that general education during VET can attenuate this trade-off. It can play a role in meeting the demand for a skilled and flexible workforce through various means, such as facilitating transitions into higher education without compromising the vocational orientation of the VET system.

However, the results of this article are limited to the Swiss context, which exhibits highly standardised curricula and narrow education programmes. The findings of Verhaest et al. (2018) suggest that practical training is particularly effective when combined with a narrow and occupation-specific focus, as can be found in Switzerland. Future research should examine in more detail the conditions under which practical workplace-based training is beneficial for labour market entry. Such research is especially relevant in light of current intentions to strengthen the apprenticeship system throughout Europe despite differences in the underlying education systems and labour market structures (Šćepanović & Martín Artiles, 2020). Furthermore, the results pertain only to the first ten years after labour market entry. The effect of the dimensions of skill acquisition on mobility through the later phases of the life course remains unknown and should be investigated in the future.

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### Conflict of Interests

The authors declare no conflict of interests.

### Supplementary Material

Supplementary material for this article is available online in the format provided by the author (unedited).

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Article

## Aspiring While Waiting: Temporality and Pacing of Ghanaian Stayer Youth’s Migration Aspirations

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### Abstract

Many youth in Global South countries, whose parents have migrated abroad while they have stayed, i.e., “stayer youth,” also aspire to migrate. While the current literature depicts stayer youth as “waiting” to emigrate, connoting passivity, recent critical youth studies suggest the importance of centring young people’s agency when focusing on their aspirations and experiences. This article investigates how stayer youth in Ghana “pace” their migration aspirations while “waiting.” By observing how youth change their aspirations over time, we first distinguish between different aspirations according to when youth first aim to migrate. Second, we “follow” stayer youth after their secondary school graduation to understand how they seek to fulfil their migration aspirations and the strategies they adopt therein. We use ethnographic data from 38 Ghanaian “stayer” young people. Our analyses show that stayer youth adapt their decision-making when they realise some misalignment between their migration aspirations and capabilities. By analysing their adaptation strategies, we emphasise stayer youth’s agency despite structural forces confining them to what has been called “waithood.”

### Keywords

Ghana; international parental migration; “left-behind” youth; migration aspiration; waithood

### Issue

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### 1. Introduction

Literature on “left-behind” youth highlights that these youth have international migration aspirations influenced by information from their parents and larger social networks (e.g., Böhme, 2015; Dreby & Stutz, 2012; Kandel & Kao, 2001; Robles & Oropesa, 2011). But while many “left-behind” youth aspire to migrate, little is known about how parental migration shapes their migration aspirations (Somaiah & Yeoh, 2021; Sun et al., 2020). Moreover, their aspirations have mainly been studied as though they are static: Once youth desire to migrate, they always desire to migrate (Kandel & Kao, 2001; Robles & Oropesa, 2011). However, how stayer youth’s migration aspirations change over time and what strate-

gies they employ when their aspirations are frustrated are questions that have received little to no attention. In this article, we use the term “stayer youth” instead of “left-behind” to avoid the negative connotations of the latter term.

In this article, we analyse how stayer youth navigate “waiting” to migrate and the actions they take while trying to realise their aspirations. Following the recommendations of scholars in contemporary migration studies, we investigate aspirations in tandem with capabilities (Carling, 2002; de Haas, 2021). Migration aspirations combined with the ability or capability to migrate determine who experiences mobility or immobility. We study young people’s migration aspirations by considering the local context in terms of opportunity structures available

to youth facilitated by their transnational family characteristics, social networks, access to information, and personal motivations (Carling & Schewel, 2018; de Haas, 2021). Capability here refers to young people's agency and their freedom to decide to move or stay based on their financial, human, and social resources, or "capital" (de Haas, 2021). Using this framework, we discuss stayer youth's initial migration aspirations and follow changes over time as they try to align their migration aspirations and capabilities.

We conducted 15 months of ethnographic data collection in Ghana, where almost 37% of children have at least one migrant parent (Ghana Statistical Service et al., 2014). We focus on stayer youth who have transitioned out of secondary school, between the ages of 16 and 23 years old, and their decision-making over time. Most of the literature presents stayer youth's aspirations as dependent on the plans of their parents, caregivers, and relatives abroad. Researchers provide adult-centric perspectives (Böhme, 2015; Dreby, 2010; Kandel & Massey, 2002) and, as a result, depict young people as passive actors whose lives are fully planned by adults. Little is known about how stayer youth agentially plan for their migration. In adapting their aspirations while waiting to migrate, stayer youth in early adulthood may pursue their migration aspirations together with significant others, especially migrant parents, or they may pursue them independently. In this article, we explore how stayer youth decide to emigrate over time based on their socio-economic background, parental support, and educational competence. We examine when and how young people involve migrant parents, local caregivers, and wider social networks in their migration decisions, and how they adapt their strategies over time.

We also extend current research by showing how stayer youth themselves adapt while waiting to migrate based on the temporalities of their migration aspirations and capabilities. The aspirations and capabilities framework we draw on conceptualises people as either moving or not moving. Yet work on temporalities has argued that movement is better studied in terms of the varying forms, durations, and timings of movement. Amit and Salazar (2020) propose the concept of "pacing" when investigating diverse temporalities of mobility. For stayer youth, this means they do not simply "wait" but have various paces: They wait for longer or shorter periods, develop strategies to deal with these, and adapt their migration aspirations accordingly. Hence, they agentially shape their lives even when waiting. They do not sit and do nothing. We explore the pacing of their migration aspirations and decisions by first distinguishing initial aspirations according to when youth aim to move. Secondly, we follow stayer youth as they try to fulfil their aspirations and observe how they adapt their strategies to ensure these align with their capabilities while also adapting the pacing of their aspirations. Finally, we show how stayer youth make decisions about when, for how long, and where to move depending on their realisation of their

capabilities. By studying how stayer youth try to align their migration aspirations and capabilities over time, this article shows how they pace their lives while waiting to migrate.

## 2. Youth in "Waithood"

Our article focuses on how stayer youth in Ghana pace and adapt their migration aspirations while waiting to migrate. Youth in the Global South have been described as "stuck" or "entrapped" in their developmental trajectories because they mostly focus on futuristic visions rather than their present lives (Hage, 2009; Hansen, 2005; Sommers, 2012). The term "waithood" was developed to denote a liminal state between childhood and adulthood in which youth feel trapped by prevailing economic, political, and social structures in many African countries (Honwana, 2012). African youth are mostly more educated than their parents but also more likely to encounter youth unemployment. This situation leads to great frustration for these youth, who perceive themselves as just as literate and employable as their Global North peers but with fewer chances to develop themselves. Hence, they develop waiting tactics, or agentic strategies of dealing with waiting, until they become employed or take advantage of opportunities to emigrate. Honwana (2012) calls for more studies on youth "waithood" and how different groups of African youth apply diverse tactics to cope with waiting.

Within the field of critical youth studies, various scholars have taken up this call to investigate how those in the Global South manage waiting. Barford et al. (2021) found that youth "in waiting" adapt to changing social contexts both on their own or by relying on social network support. In other studies, waiting youth preoccupy themselves with playing, talking, scheming, or working in order to derive some benefits from waiting or simply to keep their minds "off the stresses" (Stasik et al., 2020; Rodan & Huijsmans, 2021; Zharkevich, 2020). A range of concepts point to the strategies youth in the Global South use to cope with waiting: "killing time" and "building solidarity" (Ralph, 2008), doing "timepass" (Jeffery, 2010), "hustling to survive" (Munive, 2010), and "zigzagging" or meandering through available opportunities and forms of entrepreneurship (Jeffery & Dyson, 2013). By exercising their agency through self-help and drawing on social network support, youth waiting to migrate cannot be categorised as "stuck." Hence, by using an agentic lens and studying what youth actually do, we seek to contribute to works that show that youth in the Global South are not passive victims. Rather, they put varying forms of human agency to use when encountering life hurdles like "waithood."

## 3. Linking Migration Aspirations With Capabilities

For waithood to end, migration aspirations and capabilities need to align. Migration aspirations and the

capability to migrate determine who experiences mobility or immobility and whether it is experienced voluntarily or involuntarily. Carling (2002) shows how socio-cultural factors like family support, gender, age, personal dispositions, educational background, migration policies, and psychological motivations to stay or move shape migration aspirations, which refer to people's desires, wishes, dreams, or plans to emigrate. Carling defines migration ability as a set of opportunities (requirements) and constraints (barriers) that varies from person to person and affects migration aspirations (Carling, 2002). Meanwhile, de Haas (2021) defines migration capability as the capacity to exercise certain freedoms which give people the agency to become mobile. Aspiration and (cap)ability must align for migration aspirations to become actual mobility (Carling & Schewel, 2018; de Haas, 2021). Here, "mobility" refers to people's freedom to choose where to live, which includes the option to stay, rather than the act of moving or migrating itself (de Haas, 2021). This perspective conceptualises moving and staying as complementary manifestations of people's migratory agency. Key to turning migrant aspirations into actual migrations are the resources aspirants have and are available through their social networks, like material support and information to help overcome structural immigration constraints or barriers (Carling & Schewel, 2018; Francisco-Menchavez, 2020). These resources range from social (other people) and cultural (ideas, knowledge, and skills) to economic (material).

We extend this literature on aspirations and capabilities by focusing on the pacing of aspirations. As we discussed above, movement and mobility can best be understood through pacing, i.e., the process through which a certain pace is strived for, maintained, or reacted against (Amit & Salazar, 2020, p. 3). By showing the temporal shifts in stayer youth's migration aspirations, we identify how stayer youth strategise to migrate, and when and how they adapt their migration aspirations to their capabilities over time. We use the term "stayer youth" in the narrow sense to refer to youth who stay in the country of origin while their parents migrate abroad.

#### 4. Research Context and Methodology

##### 4.1. Structural Opportunities and Constraints That Secondary School Graduates Encounter in Ghana

For senior high school (SHS) graduates in Ghana, entering higher education, obtaining employment, or emigrating are priorities before marriage or starting a family (Dadzie et al., 2020; Honorati & de Silva, 2016; Palmer, 2005; Rhoda, 1980). However, it is difficult for all SHS graduates to enter local higher education (universities, polytechnics, and colleges, private or public) due to entrance examination requirements, financial costs, and limited admission slots. In addition, high youth unemployment rates and limited chances of finding a desirable

local career push youth in Ghana to consider emigration (Dako-Gyeke, 2016).

##### 4.2. Data Collection and Analysis

We conducted 15 months of fieldwork in 2018–2019 with 38 stayer youth aged 16 to 23 years. All participants were SHS graduates. We recruited participants from a previous survey which collected data from eight randomly selected schools in two cities in the southern part of Ghana: Sunyani and Kumasi. We followed up with students from the last wave of this survey ([www.tcra.nl](http://www.tcra.nl)) conducted in 2015. Out of the 442 students in this survey, 87 were stayer youth, i.e., children of migrants staying in the origin country. During fieldwork, we learned that some stayer youth had moved abroad for family reunification or further schooling. Others in Ghana refused to participate in the research. In the end, we were able to trace 38 young people who were living or schooling in five Ghanaian cities—Sunyani, Kumasi, Accra, Tamale, and Ho—while one or both parents resided abroad. After obtaining the necessary ethics approvals, we collected our data primarily through in-depth interviews, offline and online conversations, and participant observation. As is the practice in long-term ethnographic research, we approached informed consent as a process by regularly reminding participants about the research aims and asking for their oral consent. We conducted the research in homes, schools, workplaces, and public spaces like gyms and stadiums. After participants completed SHS, the first author joined them as they searched for jobs, worked, and engaged in leisure activities. Such occasions enabled the researcher to collect observational data and participants to develop trust in the researcher. We also conducted semi-structured interviews to deepen some of the themes emerging from the research.

Data analysis was conducted in two phases. First, we hand-coded details about young people's migration aspirations, including which significant others shaped those aspirations. In a second phase, we coded all the activities that young people engaged in while "waiting" to migrate. The final analysis entailed case-by-case profiling and case comparisons. We wrote 38 vignettes highlighting why participants were waiting to migrate and how they pragmatically adapted to waiting. To decipher patterns, the three authors discussed these vignettes in detail on several occasions. Afterwards, we compared the 38 cases studied using a table in Excel that summarised participants' main characteristics, their aspirations, and the strategies and activities in which they engaged during their wait.

All participants aspired to migrate. However, they took advantage of the time between their high school graduation and when we met them in the field (between one to three years after graduation) to adapt their aspirations as they came to better understand their actual migration capabilities. Two decided to move later on in life with the consent and support of their migrant

parents. The remaining 36 young people wished to migrate right after high school graduation. Of the 36, seven could not get the help and approval of their migrant parents for their international migration aspirations, even if these parents could have assisted them if they had agreed with their children's aspirations. A set of 18 young people had consenting migrant parents who lacked the economic capital to aid their children to migrate. The remaining 11 young people could not count on their migrant parents for any help to realise their international migration aspirations. Young people in each category shifted their strategies over time to try and align their migration aspirations with their capabilities. Although youth do not have full control over which strategies to employ, we highlight youth's agency, even in waiting to migrate.

### 5. Adapting While Waiting to Migrate

Like Somaiah and Yeoh (2021), we observed that stayer youth differed in their migration aspirations and capabilities. We assessed capability by considering participants' secondary school examination performance, as this opens or closes certain possibilities for post-secondary school transitions, as well as the financial and moral support offered by migrant parents for their children's migration aspirations and local career development. Stayer youth's migration aspirations shifted over time, both in terms of when and how they wanted to migrate and in reaction to their changing understanding of their migration capability. In waiting to emigrate, they aligned their migration aspirations with their shifting perceptions of their capabilities. We identified different alignment strategies used by four groups of stayer youth (see Supplementary File, Table A).

The first group comprises stayer youth whose migrant parents both support their children's migration aspirations and have the financial means to help them realise those aspirations. The second group consists of stayer youth whose migrant parents have the means but disagree with their children's migration decisions. The third group of young people has migrant parents who agree with their aspirations but do not have the means to assist their children's migration. Finally, the fourth category consists of young people who do not have much contact with their migrant parents. Stayer youth in the first category do not need to alter or adapt their aspirations as they concur with their capabilities. They often plan an eventual migration some time after graduating from SHS to give themselves the time to first develop themselves in Ghana. In contrast, those in the other categories often aspired to emigrate right after secondary school completion. But lacking the capability, then they decided to postpone their migration project and turned to finding local career opportunities to not passively wait. This section discusses each group's initial migration aspirations and the adaptation strategies they employed while waiting to migrate.

#### 5.1. When Migrant Parents Agree With Stayer Youth's Migration Aspirations and Have the Means to Help

This category of stayer youth represents the most privileged in our sample because their parents both agreed with their desire to migrate and had the means to help. Two participants, Cutter (aged 18, male) and Trendy (aged 19, female), felt confident in their ability to migrate and therefore chose to time their migration to best suit their aspirations. They both chose to first focus on obtaining a higher degree in Ghana. Thus, their aspirations could be seen as involving voluntary waiting. Also, the type of migration these young people aspired was different from that of their counterparts discussed below. They preferred to travel as tourists or for temporary migration. Trendy wanted to explore the world, while Cutter aimed to find employment abroad in nursing due to the better-earning possibilities. Cutter perceived this as a temporary plan that would allow him to earn enough money to save for his return to Ghana to marry and start a business.

Cutter's migration aspirations are akin to those of other youth who perceive higher returns from an education in their home country (ILO, 2013). Like others in our sample, Cutter aspired to migrate because his migrant parents encouraged him. But his parents preferred that he began university in Ghana and occasionally visited his family in the UK to acquaint himself with the UK context. They advised him to relocate to the UK only after obtaining his nursing degree, as entering university in the UK would be more difficult. Once in the UK, he could do some additional courses before joining the UK nursing workforce. For Cutter, this plan was also a way for him to reunify with his family abroad. He also saw it as a stepping stone to establishing his own family and future. With his UK income, he could marry and establish a business back in Ghana. Yet something got in the way of Cutter's plans when he did not get admitted into his locally desired university programme. Subsequently, he made an alternative plan with his parents: file for family reunification immediately while he still qualified age-wise. Two weeks after his mother visited him in Ghana, Cutter departed for the UK in her company to pursue an international college education. His parents thought it was better to continue schooling within the UK right away rather than stay home for one year in Ghana before reapplying.

Trendy, meanwhile, wanted to travel and experience Western culture. Trendy explicitly mentioned that she did not want to move abroad to join her family or to get an international education because she felt that people who travel for these reasons face racial discrimination, while tourists do not. While travel might not be considered migration, Trendy's case highlights that some young people aim to be mobile without necessarily migrating. Unlike Cutter, whose parents influenced the nature and timing of his migration aspirations, Trendy decided to discuss her plans with her migrant father only when the time was right for her. Trendy preferred to travel when

she could finance it fully herself or with only partial support from her father. She therefore first sought to finish her university degree and find a job in Ghana.

Trendy and Cutter also show that structural factors can influence how stayer youth strategise and shift their aspirations. When the structure of the Ghanaian educational system meant Cutter did not gain admission to his desired programme after secondary school completion, he resorted to changing the timing of his migration aspirations. To avoid racism, which she equated with working and educational structures abroad, Trendy planned to travel at a time when she could go as a tourist. Similar to Kandel and Kao's (2000) findings, Cutter and Trendy had extensive knowledge about the possibilities offered by Ghana's educational landscape as well as ideas about what they would encounter overseas, which motivated them to consider pursuing their university education at home before travelling.

### *5.2. When Migrant Parents Have the Means to Help But Disagree With Their Children's Migration Aspirations*

The stayer youth in this category aimed to pursue additional education abroad and/or reunify with their family. While their migrant parents had the required documentation and financial means to support their children's migration plans, they disagreed with their aspirations. They often encouraged them to pursue local schooling or professional training. But the young people refused to forego their migration aspirations and tried to persuade their parents to sponsor their moves abroad. When they realised their parents would not change their minds, they started to comply with their parents' wishes. They adapted by attending local teacher or nursing training schools like Pippy (aged 18, male), getting apprenticeship training like Lassy (aged 22, female), or joining online sewing classes like Marble (aged 22, female). They therefore postponed their migration aspirations (Pippy and Lassy) or replaced moving plans with plans for staying (Marble). This process of shifting and postponing their aspirations to fit their capabilities, as determined by the help their parents were willing to give, lasted from a few months to four years after SHS.

Pippy aimed to pursue higher education right after secondary school graduation in a country different from where his migrant parents resided. He did not want to go through the process of family reunification, which would entail living with his controlling migrant parents. He preferred to migrate individually to study to become a lawyer. Yet, he ended up enrolling in a local teacher training college, as his mother had recommended, after his parents clearly indicated that they would not sponsor his migration. After training, Pippy's mum encouraged him to find a government job, which would be easier to get as a public college trainee. As a government employee, Pippy's mother thought he would be able to save for his future international migration and legal career. Pippy's trajectory was not without bumps. After a year of fruit-

lessly trying to persuade his parents to allow him to migrate, Pippy gave up and followed his parents' advice to pursue his self-development locally through teaching or nursing training. Pippy chose to follow his migrant parents' instructions not as a renunciation of his own aspirations to migrate, but in order not to lose his parents' support. Pippy simply delayed his plans for migration, which he hoped to finance himself later.

Lassy aimed to reunify with her family in the UK. She missed them and wanted to be physically close for emotional support, like her younger siblings who resided with their parents overseas. Lassy conceived her plan for family reunification while in secondary school. For about three years, she tried to persuade her parents to support her migration, including arguing that her siblings were receiving a better education than she was in Ghana. Yet, her parents insisted on her staying in Ghana. She also did not pass her secondary school examination after three re-sit attempts. After the third re-sit, Lassy accepted to enter a local apprenticeship training, as her parents directed. Although her parents did not share her views, Lassy thought that the local apprenticeship training and a subsequent entrepreneurship plan would equip her with relevant skills to obtain international employment whenever she gets an opportunity to emigrate.

Although youth in this category feel disappointed by their migrant parents' lack of support, they recognise, with time, that persuasion cannot motivate their parents to help them migrate. They therefore comply with their parents' instructions to be assured of parental support for their daily needs. Yet, they perceive staying in Ghana as a temporary solution, probably due to a local substantial migration culture, and often do not abandon their aspirations to migrate. Rather, they pace their migration aspirations through delaying strategies.

### *5.3. When Migrant Parents Agree With Their Children's Migration Aspirations But Do Not Have the Means to Help*

Some stayer youth aspire to migrate, and while their migrant parents agree with their children's plans, they lack the means to help. These parents offer young people hope that family reunification is realistic, but they often face financial and legal constraints, especially those migrant parents who are undocumented (Fresnoza-Flot, 2009). Some youth in this category latch on to the hope offered by their parents and put off finding alternative opportunities in Ghana. Donna (aged 18, female) attached herself strongly to her father's promises and did nothing for a while after secondary school completion. While waiting, Donna helped her maternal grandmother, her local caregiver, with sales in a small kiosk in front of a rented room. After one year, Donna grew dismayed with her father's promises and applied and gained admission to study business at a local university. Donna seemed proud of her decision to return to school instead of waiting for family reunification:

At first, I liked the idea that my father was there [abroad], and every time he would tell us that he would come and take us. Now he has made me forget about travelling. Now I am not relying on him. Last time he said I should look for someone to do a passport for my younger sister. My sister told me that I should stop because my father is deceiving us....We have waited for things to change, but nothing has changed. Things are just as they are.

Donna did not abandon her aspiration to migrate. On the contrary, she hoped a local degree would make her better placed to later apply to do an international master's degree. Donna gained admission to a local university with the financial and moral support of her migrant father.

Ntonsu (aged 22, female) similarly grew dismayed with her mother's empty promises and decided to take her aspirations into her own hands. What seemed most achievable to her was the romantic partner pathway. Ntonsu's mother lived in the UK as an asylum seeker. She lacked the required financial resources to support Ntonsu's migration aspirations but promised Ntonsu that she would assist her to move to the UK as soon as she became a documented migrant. This promise started as soon as Ntonsu's mother arrived in the UK, when Ntonsu was about 10 years old. Ntonsu's fervent desire to join her mother influenced her decision to accept a long-distance romantic relationship proposal from a young Ghanaian man living in Italy. They started their relationship online and met physically on his occasional visits to Ghana. However, she stopped the relationship when she realised that he was married. Now Ntonsu is pursuing a diploma to become a medical counter assistant. Through her work, she hopes to save enough for further local training to become a licensed nurse like her sister. Ntonsu hopes her nursing salary will then help her to save for her migration dream.

A clear pattern amongst the youth in this category is their strong desire to reunite with their parents abroad and belief that family reunification will be possible, largely encouraged by their migrant parents' assurances. Yet, when they realise that the situation is not as hopeful as they initially thought, they re-strategise about when and how to move. They take actions based on what they perceive to be their capabilities and pace their migration aspirations from family reunification to education or labour migration at a later date.

#### *5.4. When Migrant Parents Are Detached From Their Children's Migration Aspirations*

This group consists of two sets of stayer youth: (a) those who are not encouraged by their parents in their migration aspirations because these parents cannot afford to sponsor their children's migration and (b) those who barely have contact with their migrant parents. In both cases, the young people get inspiration and capabilities for migration from other sources.

Dusty's father does not have the resources to support his son financially. Yet, unlike the parents of young people in the third category above, he also does not offer any promises. Dusty (aged 18, male) therefore turns elsewhere for his inspiration:

He [the migrant father] is not performing. Sometimes we have disagreements with him....The person who inspires me was my senior at SHS. We used to play in the same team. But he was my senior. He too moved to Accra. He came to settle here [Accra]. Later, he was able to get the chance to go abroad [Italy] and play football. So, he has been inspiring me to, like, work hard so that I can come outside [abroad] and play.

Young people like Dusty pursue their migration aspirations by relying on moral and financial support from adults in their local and international networks, like his football manager (current caregiver), church members living in Ghana and abroad, and stayer mother. Dusty got financial support from his stayer mother and her partner to obtain a passport. His manager arranges matches for him. In the quote above, his previous teammate provides him with tips and tricks he can implement in Ghana to get an international football opportunity. Additionally, members of his church encourage him to remain hopeful.

All the youth in this category consider migrant parents' support for their migration aspirations to be inaccessible. Feeling abandoned by their migrant parents, these youth still aspire to migrate. Education provides a pathway, as Gusta (aged 21, male) and Mape (aged 19, male) told us. Realising that it is impossible to travel for international bachelor's degrees right after secondary school, as they initially hoped to do, Gusta and Mape gained admission into two different public universities in Ghana to study chemistry and computer science, respectively. They studied with their stayer parents' financial and moral support and that of extended relatives in the diaspora. Unlike Gusta, who shifted from aiming to migrate by pursuing an international education degree to pursuing a musical career abroad in an unknown future, Mape received a promise from a maternal aunt residing in South Africa that she would assist him financially to follow an international master's programme after he successfully completed a local bachelor's degree. This promise was Mape's main motivation to remain studious and hopeful about emigrating soon.

Goshie (aged 16, male) was less lucky. He did not manage to qualify for university entrance in Ghana, which he attributed to his migrant father's neglect. Lacking support from his father for his education and daily survival, Goshie failed an examination required for him to enter a local university or polytechnic. He now hopes that his stayer mother can raise the needed finances for him to apply for study abroad scholarships. Goshie knew his mother was too poor to help him financially but urged her to call on her rich friends and family members for money. His mother did everything possible,

but the help was not forthcoming. Goshie therefore decided to look for local jobs, including street sales and primary school teaching, to save money for his future migration project. Goshie felt it was worth working hard to align his migration aspirations and capabilities rather than bemoaning his migrant father's abandonment of his family in Ghana.

Given the lack of support from their migrant parents, youth in this category pace their migration aspirations via delaying and replacement while continuously strategising to increase their migration capabilities. They rely on broad social network support, including from caregivers and friends, for information, money and motivation for their migration plans (Böhme, 2015; Francisco-Menchavez, 2020).

## 6. Conclusion

The aspirations of youth in the Global South, including those of stayer youth, are shaped by their capabilities, which stem from family support, access to migration information, gender and academic achievements (e.g., Böhme, 2015; Kandel & Kao, 2000; Somaiah et al., 2020). Yet, aspirations are too often treated as unchanging: either you aspire to migrate or you do not. Simultaneously, youth in the Global South have been characterised as being in “waithood”—a state of limbo between childhood and adulthood—due to a lack of opportunities at home and restrictive policies in the Global North (Batan, 2010; Honwana, 2012). Focusing on when youth aim to migrate and the strategies they use to realise their migration aspirations, we unpack what waithood looks like for stayer youth and uncover the diverse activities and strategies entailed in waiting (Stasik et al., 2020). First, we categorised participants according to their initial capabilities. Then we studied how stayer youth adapted their migration strategies given their migration capabilities, resulting in the pacing of their migration aspirations (Amit & Salazar, 2020).

Using a temporal lens that considers how aspirations change over time, our ethnographic study found that stayer youth's migration aspirations were paced differently based on their capabilities. Parental emotional and financial support determined stayer youth's initial migration capabilities upon completing secondary school. After secondary school completion, some participants aspired to migrate immediately. Others preferred to wait until they had achieved a particular milestone in Ghana, be it a tertiary degree or the acquisition of other skills that would better equip them for finding a job abroad. Stayer youth then employ agency based on their socio-economic status to pace their migration aspirations to better align them with their capabilities. Privileged participants had parents who agreed with their aspirations and had the means to support them. As a result, these youth experienced voluntary waiting. The other youth we studied encountered involuntary waiting. They lacked the ability to migrate due to

transnational family power struggles, financial or legal constraints, or detached parenting. Consequently, these stayer youth resorted to shifting by delaying or replacing their aspirations in line with their capabilities. They thereby expressed their agency through various strategies to cope with waiting while aspiring (Cooper et al., 2021; Lam & Yeoh, 2018; Osei et al., in press).

This article thus contributes to transnational migration studies that overlook stayer youth's agency and their ability to cope with and shape forces structuring their lives. While structural forces constrain or encourage youth's migration aspirations, youth demonstrate agency in aspiring to move, irrespective of whether such aspirations are realised and become actual migration (Carling & Schewel, 2018; de Haas, 2021; Setrana, 2021). Literature on stayer youth's aspirations has mainly emphasised that youth aspire to migrate because their parents reside abroad. Yet, by studying the perspectives of stayer youth and observing what they do to realise their migration aspirations, we find that they may start with unrealistic ideas of their migration capabilities. But as time progresses, they adapt and strategise to align their aspirations with their capabilities. In so doing, they actively pace their aspirations (Amit & Salazar, 2020). Stayer youth have been conceived of as being in a state of waithood: stationary and largely reacting to their parents. By focusing on the perspectives of stayer youth, we contribute to recent calls in critical youth studies to unpack waiting. Even in waiting, youth express agency.

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## Conflict of Interests

The authors declare no conflict of interests.

## Supplementary Material

Supplementary material for this article is available online in the format provided by the author (unedited).

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Article

# Professional Trajectories in Migrant Biographies of Qualified German, Romanian, and Italian Movers

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## Abstract

This article tackles the issue of professional inclusion of “knowledgeable” migrants under consideration of the paradigmatic life course framework. It thus aims to contribute to international research on human capital valorisation. The comparative analysis of this study is grounded on qualitative data from 30 in-depth interviews with German, Romanian, and Italian qualified movers in Italy and Germany, who did not migrate for reasons resulting from economic hardship or poverty, but rather to improve their living conditions on familial (tied movers), professional, or socio-cultural level. Our research aimed to investigate their professional trajectories and corresponding skill utilisation. Findings of the study confirm two predominant tracks of professional integration in the labour host context characterised either by transcultural competence transfer and utilisation or by professional re-invention and skills acquisition. Particular attention within the data analysis and corresponding conclusions has been paid to potential dynamics for social and economic up and downward mobility and the role of the three heterogenous (more and less privileged) national and cultural backgrounds for brain circulation.

## Keywords

brain circulation; life course; professional integration; qualified lifestyle migration; skills valorization

## Issue

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## 1. Introduction

Increasingly altering labour market dynamics and the intertwined thrive to advance a knowledge society are having a significant impact on global mobility and human capital flows (Habti & Elo, 2019). In light of the global pandemic, the fast-pacing formulations for needed skill sets and evolving lacunas for qualified labour are likely to challenge several national contexts in Europe (Chi-Wei et al., 2021). Missing, unrecognised, and unutilized qualifications elicit a situation that prevents progress, innovation, economic growth, and stability in the EU.

This notion is corroborated by OECD statistics from 2017 that support the rising demand for mobile workers and confirm that skills and educational capital in Europe still trail far behind other knowledge societies on a global level, such as the US skills magnet or Australia. This points to a need for spatial mobility on the one hand,

and to an increasingly requested flexibility and adaptability in different professional fields, supported by continuous education and training in order to stay competitive in the labour market (OECD, 2017b).

Accordingly, it becomes gradually more important to research intra-European talent and knowledge distribution, in particular on drivers that cause, alter, and amplify mobility decisions of “knowledgeable movers” (Lulle & Emilsson, 2021) to direct international labour investment, training, and recruitment. Especially mixed forms of mobility, where migrants can switch categories according to convenience from skilled to non-skilled, pushed by economic reasons, professional ambitions, lifestyle change, or study purposes call for a consideration of the “double embeddedness of migration” (King, 2002, p. 101). This refers to the individual’s life course on the one hand and to the origin and host societies on the other, which are both presumed to have a decisive

impact on the progression of the labour market. Indeed, in the European context, research has been advanced on determinants that generate and direct human capital flows on micro and macro levels (Kõu & Bailey, 2014; Ryan & Mulholland, 2013); however, only a few studies turn their lens specifically on the interrelation of life course dynamics, migration expectations, and professional integration (Kõu et al., 2015), which accordingly represents a central gap in the international literature (Bailey & Mulder, 2017).

In this context, a vast body of scholarship points to the linked significance of family members for the formulation of migration motivations (Forsey, 2015; King & Lulle, 2016; Tissot, 2016). They call for attention to the expectations and choices of migrants in family life in the home and host contexts to understand high-skilled migration also beyond human capital generation and utilisation (Kõu & Bailey, 2014) and to assess their potential role in the host society (Bailey & Mulder, 2017).

Further to this, Ette and Erlinghagen (2021) underline the need to consider the heterogeneity of migration motivations within the EU and to shift the existing focus on East to West migration and particular migrant groups also to other geographical areas. In their study on migration motivations among German emigrants, the authors found out that more than half of all study participants moved for professional reasons, whereas 45% indicated also a change in personal lifestyle as a leading indicator of their desire to leave their home country.

Drawing on these premises this research aims to fill these voids and investigates a category of movers who decided to leave their home country on a permanent, circular, or indefinite temporal scale for the sake of professional advancement, in search of a new way of life, or for family reunification.

Building on the assumption that socio-economic, political, and cultural systems (e.g., legal regulations, language, religion, historical identity) as well as societal institutions (educational systems) pre-shape expectations and thus drive decisions for individual and household life trajectories (Wingens et al., 2011), the focus of this work has been put on comparing the professional inclusion dynamics of knowledgeable migrants from Germany, Romania, and Italy in two national host contexts. Particular attention has been paid to the interrelation of their migration motivation and the aspired and realized skill valorisation. The latter refers thus to the coherence of educational/cultural capital stocks and occupational positions in the host contexts.

Even though Romanian migration has been predominantly perceived as labour migration (Barbulescu et al., 2019) this work aims to focus on Romanian migrants, who, just like their German counterparts, did not move to Italy out of economic precarity or poverty, but mainly for non-economic reasons such as love, (professional) self-fulfilment, and training, or to change their way of life.

The comparative case study has been conducted in Turin and Munich, representing two major metropolitan

areas with comparable characteristics on an economic and socio-cultural level, with a study sample of respondents who can be allocated to the category of “highly skilled.” Accordingly, data has been retrieved from 30 semi-structured interviews online.

The article has been organised as follows: The first section aims to provide a short socio-historical overview of Italian mobility in the German national context and of Germans and Romanians in the Italian one as well as a brief discussion on skill valorisation. This segment is followed by an outline of the theoretical framework used for the data analysis within this study and some methodological remarks before discussing the main findings that have emerged. Finally, the last part will be dedicated to a brief discussion of the findings and potential lines of further research.

## **2. Setting the Scene: Migration and Skill Valorisation in Germany and Italy**

The Fordist industrial development and the economic post-war boom caused a growing intra-European mobility that turned emigration to immigration countries, as exemplified by Germany and Italy (Bade, 1992; Bonifazi et al., 2009). In Italy, interregional South-North and rural-urban mobility flows could be predominantly observed towards Northern metropolitan provinces as the industrial triangle Milan, Genoa, or Turin, historically the “major poles of attraction” (Bonifazi & Heins, 2000; Bonifazi et al., 2009).

The 1960s and early 1970s marked a period of Italian guest worker mobility to European countries. In Italian population statistics from the 90s, the country observed an increasing number of foreign-born nationals, which inverted the trend of the previous decades.

Parallely the German population statistics were significantly characterised by the guest worker movements, whereas the majority of temporary foreign labour came from Italy (Luthra, 2013). From the 1980s onward, approximately 10% of the working population was represented by foreign labour (Coccia & Pittau, 2016; Hoerder, 2010).

Current data from the German Federal Statistical Office (2021) confirms a rising emigration flow in the new millennium, with a peak in 2016 when 280,000 Germans left their home country (Schroot & Marroccoli, 2021). However, little research informs on German migration to Italy, motivation, or professional trajectories, as Italy is not and has never been among the top German emigration destination in recent history (Hamburger & Sander, 2016). Instead, according to ISTAT data, the majority of foreign inflows corresponds to citizens coming from Romania (14% of the total incoming foreigners in 2018), followed by countries like Albania (6.3%) and Morocco (5.9%).

Germany’s popularity as a destination for Italian migrants has been growing steadily. However, from a comparative perspective, incoming and outgoing shares

of human capital and potential qualified workforce for the Italian labour market remain unbalanced. This regards in particular net numbers, but also the lower rates of skill matching for foreign immigrants (Coccia & Pittau, 2016).

Indeed, the German labour market provides for a strong occupational segment that is built on a stratified and standardized school and transition-to-employment system, industrial relations, labour laws, and a relatively early labour exit with an average of 43% of men and only 15% of women still working at the age of 60. These indicators facilitate job and skill matching in several professional areas, lower the risk of unemployment and inequality of occupational status (Heinz, 2003; Luthra, 2013), and represent Germany in international comparison as an “economically highly developed welfare state” (Erlinghagen et al., 2021, p. 10).

Italy instead has developed in the latest decades as one of the main destinations of international migration, even though receiving one of the lowest shares of incoming movers with tertiary education (Barbulescu et al., 2019). Indeed, the Italian context provides for an overall very low social mobility with little return on education (Assirelli et al., 2018), which is additionally starkly driven by the geographical origin of its labour. Avola and Piccitto (2020) have researched the occurrence of the “ethnic penalty” in the Italian labour market and found out that, firstly, foreign workers are increasingly challenged in pursuing social mobility compared to native labour, especially if they come from economically disadvantaged contexts. Indeed, migrants from stable economic contexts resulted less penalised. Secondly, they concluded from their findings that intra-generational occupational mobility occurs in general to a very limited extent in Italy, also for natives.

In this context, it must be noted that Italy has generally a rather high demand for low-qualified and low-paid workers, which is due to the stark presence of small firms in rather traditional sectors, such as tourism, manufacturing and construction, low investment in R&D, and a decrease in occupation public sectors (Assirelli et al., 2018).

Labour trajectories must be thus analysed in relation to tendencies in the labour market. Hence, the economic crisis of 2008 and the development that followed it pushed several natives and, in particular, (qualified) migrants from formal to informal employment niches that blocked further career progress, at least temporarily (Croitoru, 2018). In a migratory context, professional mobility must be considered in its wider context, and thus not solely in terms of economic profit and career progress. (Pre-departure) investments and gains of human capital, such as the building of linguistic skills and social capital, are grounds for (social and professional) integration in the host context (OECD, 2017a; Schroot & Marroccoli, 2021). Furthermore, the issue of class status and socio-economic and professional mobility is transnational in constitution. It must therefore be analysed outside of national contexts and borders, as it

is characterised by different ways of capital acquisition and recognition (Mihai & Novo-Corti, 2020; Scott, 2019).

Building on these premises, the participants of this study have been selected according to their particular characteristics for both host contexts. Romanian migration to Italy has a relatively short history but represents the most significant foreign community in the country (Ricci, 2010; Stan & Erne, 2014). Geographical and linguistic proximity, shared cultural traditions, and the increasing presence of Italian business in Romania are presumed to be some of the decisive determinants that put Italy in a top position of European destinations for Romanian migration (Cingolani, 2007).

German skilled movers are not comparable in numbers to their Romanian counterparts but represent an intriguing and contrasting study sample. The majority of those who decide to leave their home context can be allocated to the category of “qualified and highly skilled labour force”: 50% of them hold an academic degree (Ette & Sauer, 2010).

To provide a valid comparative perspective, this research considers a third category of movers and a second host context. Indeed, the literature confirms that qualified Italian labour force lacks access to adequate job offers that match skills according to working conditions (Avola & Piccitto, 2020), which emphasises the strong economic and non-economic incentives for them to migrate (Assirelli et al., 2018; Lulle & Emilsson, 2021) and the low return rate once they have chosen to move abroad (Saint-Blancat, 2019). All our study participants come from very diverse socio-cultural and political national settings, which points to the context-boundness of thought, behavioural, and decisional patterns.

### 3. The Sociological Life Course Approach: A Theoretical Framework

The conceptual framework for the analysis of the retrieved data draws on the call for mixed approaches within migration research (Erlinghagen, 2021) that should overcome the strict distinction and separation of the two leading paradigms forwarded in the latest decades: the life course theory and the transnational migration perspective. While the life course approach focuses on the causal relationships of determinants and outputs or consequences within the migration process, highlighting the significance of social pathways in historical time and place (Elder et al., 2003; Erlinghagen, 2021), the transnational perspective focuses on (transnational) practices and belonging to social fields (Basch et al., 1994). These unite different geographical, socio-political, cultural, and economic locations and networks, and connect the origin and destination contexts of the migrants. This perspective lacks a chronological reference frame but may describe specific settings within the migrant’s life (Erlinghagen, 2021).

The central aim of this case study is to delineate mobility as an important transition with lifelong

implications for the life course trajectory, in particular for the professional pathway of the sample respondents. Accordingly, the theoretical frame of this work builds on Erlinghagen’s (2021) proposal to combine both approaches to carve out the potential of the two different perspectives on individual mobility pathways.

The Sociological life course approach points to the interrelation of the timing, pacing, and sequencing individual life course events with societal economic, political, and cultural systems, structures, and institutions. Those affect and pre-shape, accordingly, individual choices, preferences and decisions, and provide a frame for a standardized life course or expected biography, as international studies (Caponio & Estévez-Abe, 2022; Croitoru, 2018; Kõu et al., 2017; Sandoz, 2020) illustrate. In the same vein, biographical life paths influence the societal context on socio-economic, juridical, and cultural levels (Heinz, 2003; Wingens et al., 2011). Speaking of migration and social inclusion in general, and of professional integration dynamics in particular, this notion is central, as it points to the agency of time and place, or in other words, of the home and destination context for the mover. Hence, the case study develops in two stages that range from the decision-making process in the home country of the respondents (On Departure), to professional integration in the host context (On the Ground).

The first stage will undergo an analysis that draws on the sociological life course approach. In the second stage, I take predominantly the transnational migration concept into consideration and compare the role of home and host context (as combined social field) for professional trajectories, and thus skill recognition and valorisation (see Figure 1).

The selected study sample draws on three national contexts with very heterogeneous socio-political, economic, and historical backgrounds. Accordingly, all target countries reveal contrasting European traditions in their collective habitus, in particular in the context of migration. This heterogeneity is further corroborated by the starkly individualistic and collectivistic patterns that prevail in three socio-cultural origin contexts of the respondents in the sample.

Settersten (2015, p. 223) reminds us that “we too often study individuals as if they exist in isolation of oth-

ers, and our methods further fracture whole people into tiny variables.” Particular importance in life course theory has been given to “family” as one of several institutions that may have a decisive impact on the pre-shaping and scheduling of expectations and life-course events as well as opportunities, decisions, and actions over the social pathways (Forsey, 2015; King & Lulle, 2016; Tissot, 2016; Uhlenberg & Mueller, 2003). Consequently, newly tied relationships may shape decisions on the life course towards mobility, represented by King (2002) as “love migrations,” as well as intra-familial bonds through care delegations as an indicator for a potential return migration (Kõu et al., 2017; Scott, 2019; Uhlenberg & Mueller, 2003).

#### 4. Towards Interdisciplinarity: Some Methodological Remarks

The present research sought to interrogate the causal relations of expected careers and professional progress during the migrant trajectory in the context of the stage in life. It thus questions if and how the initial migration motivation is related and even determines the competence valorisation in professional paths in the host context. In this regard, an analytical lens has been put on eventual professional upward or downward mobility dynamics that are determined by the movers’ (un)ability to transfer their capital and resources from the host to the home context. Upward and downward mobility over the migratory life course trajectory is an ambiguous and contested concept, especially when talking about skilled migration from disadvantaged national contexts and aspired escalator effects (Scott, 2019). Downward mobility is mainly determined by occupational indicators when career trajectories and positions cannot be continued in the host context. However, in this case, downward occupational mobility is not coherent with the economic treatment in the host context, as, in fact, professional downgrading often runs parallel to higher wages.

This work considers upward and downward mobility from both the professional and the economic perspective and investigates, on the one hand, the acceptance of jobs of lower status and occupational decline and (better) economic treatment on the other.

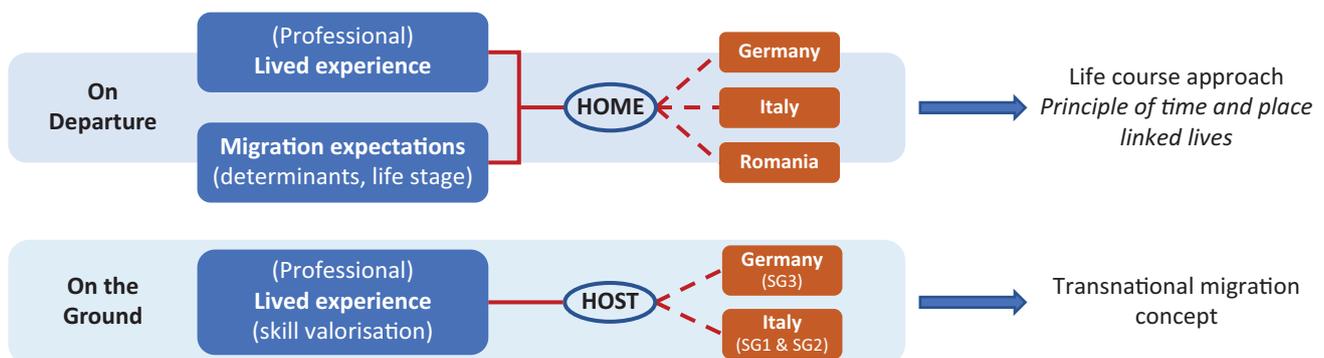


Figure 1. Theoretical framework.

#### 4.1. Study Sample

The data that informs the comparative analysis of this case study has been retrieved in the frame of a macro study on skilled migration from 38 semi-structured in-depth interviews with German, Romanian, and Italian qualified movers that were conducted face-to-face between 2018 and 2020 in the Turin Metropolitan Area, Italy, and online from 2021–2022 with respondents in Munich, Germany. Of these, 30 interviews were selected for the sake of a more homogenous sample and to meet the research objective of this case study. Data has been scrutinized concerning the primary migration motivation of movers following the pre-set selection criteria and excluded respondents who indicated to have moved for economic reasons and poverty.

All participants had been living and working in either Munich or Turin for at least five years and could be allocated to the category of “(highly)-qualified labour force” according to Salt’s (1997) definition, i.e., holding post-secondary academic or professional education and having at least five years of work experience.

The study participants have been distinguished into three sample groups:

- SG1\_Romanians in Turin (n = 8)
- SG2\_Germans in Turin (n = 8)
- SG3\_Italians in Munich (n = 14)

Interviews have been conducted with 19 women and 11 men with a medium age range between 35 and 50 years. Twenty-eight out of 30 study respondents were in a relationship, i.e., engaged or married, and 25 participants had children (two on average).

#### 4.2. Research Design

This study is grounded in a bottom-up approach and was designed based on a qualitative approach for data collection, which is confirmed by the choice of the semi-structured interview as the leading and central research method. All interviews were recorded, transcribed verbatim, and analysed with the qualitative data software N-Vivo. Building on the conceptual framework and the considered research question, data has been structured using a deductive coding method (Miles et al., 2014) that provided for the three macro themes of this work: the migration motivation and expectations of the respondents (home); professional integration dynamics (host); employed strategies for skill accumulation, cultivation, and transfer.

All investigations and analyses were premised by the author from an emic and etic perspective (Hammersley & Atkinson, 2007; Salzman, 2002). Own biographical experiences played a central role in the collection and interpretation of research findings, as the author shares the country of origin (SG2), the migratory experience, and the destination context (Turin) with some respondents.

Several questions and investigations benefited from the author’s insight and socio-cultural, political, and linguistic background. In particular, the latter eased access to German study participants and facilitated the interview conduction with all respondents in German and Italian, as “language is the fundamental means of establishing a climate of empathy, and therefore of communication, between the interviewer and the interviewee” (Corbetta, 2003, p. 279).

Additionally, sharing a migratory past facilitated, in some cases, negotiation and access to the field, as study participants were often approached through private and professional contacts. The snowball technique was mostly used for further recruitment.

#### 4.3. Research Sites

Turin (Italy) and Munich (Germany) represent intriguing study locations for comparative research: First, both urban contexts have a long migration history (Bade, 1992; Bonifazi & Heins, 2000; Rieder, 2005). According to the latest ISTAT (2021) data, the share of migrants in Turin makes up approximately 15% of its current total population. Even though widely outnumbered by Munich (28%), both contexts belong to the top four cities with the highest foreign population share in their national contexts, which renders them potential “laboratories of diversity” (Trenz & Triandafyllidou, 2017).

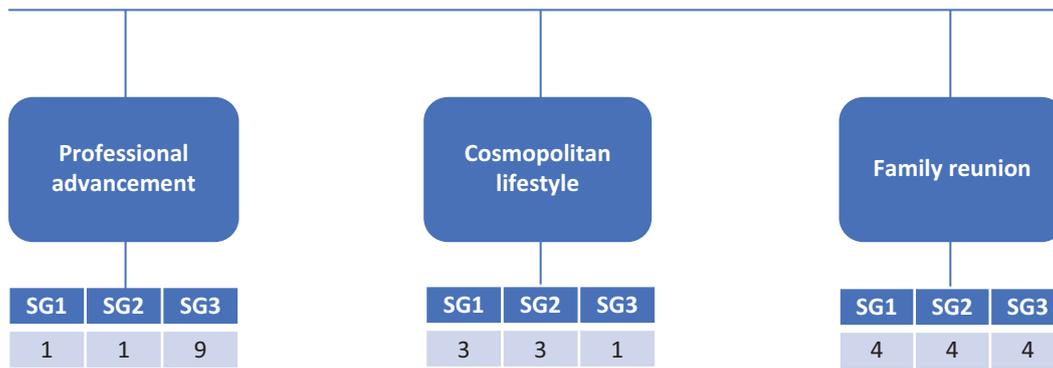
Secondly, the Turin Metropolitan Area hosts more than 8% of the Romanian community in Italy and has thus one of the highest concentrations in the country. ISTAT data from 2021 shows that the share of Romanians makes up 41% of the total foreign population in the aforementioned region; accordingly, they outnumber previously predominant immigrant nationalities in the area (Omede & Procopio, 2006). In contrast, Munich has a reputation of being “Italy’s most Northern city” for its geographical proximity to Italy and the notorious presence of the Italian community in the city.

Thirdly, both urban contexts are represented by the most prestigious and traditional universities in Europe and thus important “production sites” of highly skilled and human capital, other than being leading business centres in their national contexts, especially in the automotive and banking sector.

### 5. Results

#### 5.1. On Departure: The Interrelation Between Migration Motivations and Expectations

The sample data informed on three subcategories of initial motivations for high-qualified migration, which point to the variety of expectations allocated to certain stages of the life course (Figure 2). Pushing factors for professional advancement were correlated to aspirations for training opportunities and an increased coherence between obtained skill sets and career progress.



**Figure 2.** Migration motivation framework. Notes: Total sample is 30; SG1 stands for Romanian transnationals in Turin (n = 8), SG2 is German transnationals in Turin (n = 8), and SG3 is Italian transnationals in Munich (n = 14).

Mobilities that had been initiated in search of adventure, international experiences, or for political and socio-cultural reasons (such as disapproval of systems in the home context) have been labelled “cosmopolitan lifestyle migrations.” The third subcategory refers to what King (2002) calls “love migrations,” in which highly-skilled migrants changed their residence country as tied movers in settled relationships.

While Romanian and German respondents (SG1 and SG2) were quite equally distributed in the second and third subcategories, the majority (n = 9) of Italian study participants (SG3) can be allocated to migrations for the sake of professional advancement. This tendency toward professionally motivated mobilities within the Italian sample is not surprising considering the economic predisposition of both target countries (Germany vs. Italy) and the resulting socio-economic advantages for potential career progression.

Respondents of all sample groups started their mobility from a rather stable position in the labour market in their home country. Following the sample criteria for selection of the study participants, none had left their home context out of poverty or economic precarity, but rather for the intention to pursue a certain desired lifestyle.

It results from the data that professionally motivated mobilities (mainly SG3) are not mainly driven by unsatisfactory competence valorisation in their home country, but very often stirred by the aspiration to gain experience abroad or to exploit training and upskilling opportunities as an investment for a future career. Common criteria of choice that steered their migration decision were already existing language skills, results from market research for skill valorisation, and the desire to develop a professional profile for the aspired occupational field.

Also, the majority of SG1 respondents (Romanian nationals) left their home country in employment positions that were coherent to their existing educational and cultural capital at the time, ranging from professions in the art sector and the engineering field to journalism. Having met their Italian spouse in Romania, they

also came to Italy for love, though most of the time through business relations, or looking to change their way of life.

The desire for a lifestyle change was mainly motivated by an unsatisfactory socio-political climate in their home country (Romania) and often stood in close relation with the year and era of departure. Indeed, concerning the principle of time and place, this issue is decisive in particular for Romanian mobility. Perceived and lived corruption in a post-1989 reality—characterised by the breakdown of the Communist bloc and an ending bipolarity—are common indicators of the desire to move to another national context. Priorities for change of German respondents were rooted in socio-cultural rather than socio-political circumstances: Cosmopolitan knowledge gained from prior travels and professional experiences created an image of the Italian lifestyle that foregrounded their desire to spend a period abroad.

As Elder et al. (2003) note, social change may have a decisive impact on planned trajectories and alter the routine pathways of individuals. Thus, socio-political and economic developments, newly established affective ties or, in contrast, concluded relationships were some of the major reasons that triggered the mobility decisions of the participants of this study. International research highlights the interdependence between life course events “or the stimuli that create changes in family composition” (Clark & Davies Withers, 2007, p. 593), such as marriage and childbirth, and migration decisions. Consequently, priorities and needs that determine the migratory trajectory are constantly changing and re-define the roles of tied movers within a family as well as the temporal dimension of the mobility. Data from this study has evidenced and confirmed a presumed stark interrelation between the migrant’s stage in life and the according motivation towards mobility and preferences for personal (professional) development. The majority of our respondents moved with their spouses for professional reasons, to set in motion a lifestyle change, or for the sake of family reunification in either Italy or Germany; thus, migration preferences and choices were starkly oriented by family-related needs and wants.

Scholars further confirm the significant role of children in long- and short-term migration intentions. Aspirations for the children's well-being may thus lead to different priorities and decisional outcomes on a spatial and temporal level which renders familial migration a set of diverse occurrences rather than one single event (Moskal & Tyrrell, 2016). Relevant indicators that build the basis for the formulation of familial strategies and choices may regard standards of security, freedom of choice, flexibility, property rights in the potential host context, or an environment adapted to family needs concerning social politics and educational systems (Bailey & Mulder, 2017; Moskal & Tyrrell, 2016; Ryan & Sales, 2011; Valtolina, 2013). Findings suggest that aspiration for career progress and professional mobility are secondary especially for tied movers in the pre-departure phase, as they put focus predominantly on the educational path, competence training, and well-being of their children rather than on their own training or career goals in the host society. These observations are corroborated by Scott (2019), who confirms that temporary downward mobility, de-skilling, or delayed gratification become more acceptable if the initial and principal migration motivation was not primarily related to professional advancement. Study participants who have been allocated to the categories of cosmopolitan and tied movers built their working trajectory solely upon arrival in the host context and elaborated, after initial skill acquisition (especially linguistic competencies), strategies to recover their professionalism in the destination context, as the following excerpt exemplifies:

When he [the respondent's son] arrived, he did not accept that, as a former professor, I [took to] cleaning....Little by little, he understood that this is life, that we are foreigners in a foreign country, that we must live and do what we find, not that we choose....As a teacher in Romania, I had this approach to people...and I never backed down [from] someone who needed me....I discovered that I liked...to talk, to chat, to care for others....I discovered that I wanted to do more than just assistance work. So, first I did my training and qualification as a nurse, then I discovered that I really liked massage, so I enrolled in the Academy for Massage Therapy, where I got my certificate, and then I found out that I like osteopathy, and so I am registering for further qualification this fall. (SG1, female)

Professionally motivated movers, in contrast, had concrete pre-departure expectations for their professional insertion and integration in the host context. Indeed, all respondents belonging to this category moved with a clearly defined professional (short- or long-term) "project" to the host context, framed through formal (i.e., pre-established work contract) and technical conditions (i.e., delineated task and job description).

## 5.2. On the Ground: Aspired and Realised Skill Valorisation and Professional Mobility

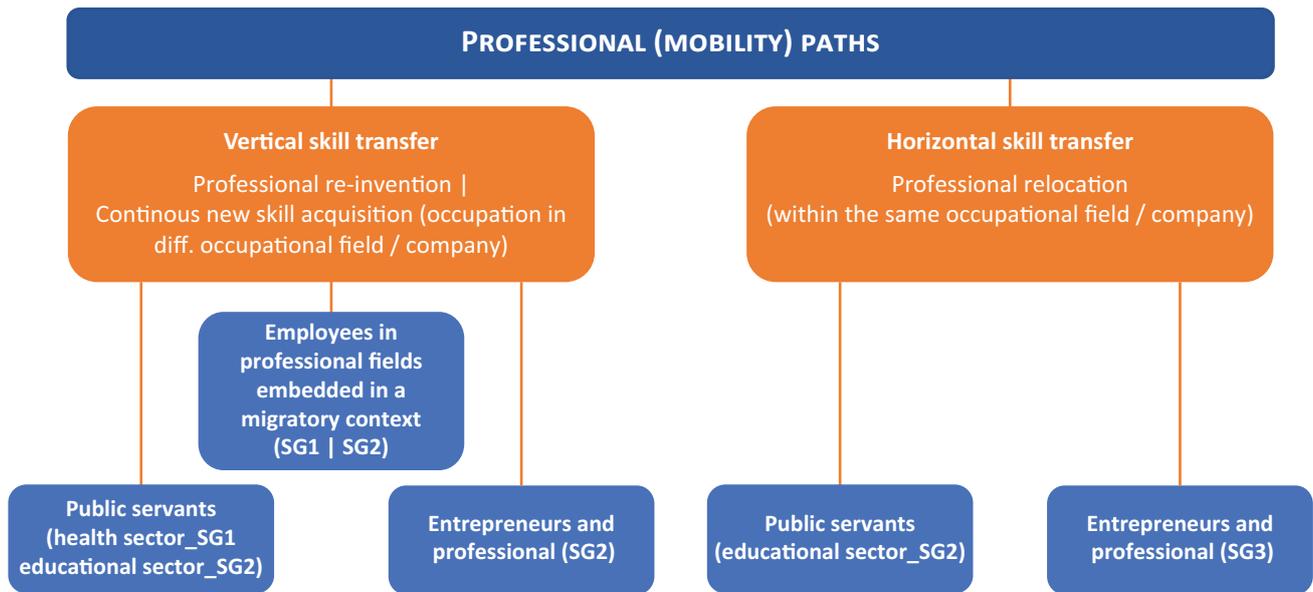
Figure 3 illustrates two predominant professional tracks that have been observed for the skill trajectories (Jasso, 2003). Drawing on Brown et al.'s (2000) conceptualisation of vertical and horizontal learning, this article adopts this concept to skill transfer. Accordingly, horizontal skill transfer points to a spatial and timely "relocation" of competence sets from one professional setting to another in two contexts. In this regard, the transnational perspective is guiding as it points to the implementation of skills and knowledge in two national contexts and thus the building of transnational socio-cultural capital. According to international studies (Banerjee et al., 2019; Verhaest et al., 2017), the horizontal match of skills is higher in countries with strong employment protection.

Vertical skill and knowledge transfer on the other hand relies on the continuous accumulation of capital and (often forced) professional re-invention through occupation in different professional fields than those of the origin contexts. They often require lower levels of education and thus point to a "vertical mismatch," when workers are overeducated for the job they are performing (Banerjee et al., 2019).

Accordingly, professional re-invention and the change of the prior occupational field occurred mostly for SG1 and SG2. Respondents often experienced structural and socio-cultural obstacles that prevented skill transfer and forced them to integrate into occupational sectors that were not coherent with their prior educational and professional trajectory in the home context. A particular barrier to professional integration and a facilitator for deskilling dynamics observable for SG1 respondents were the missing or incomplete accreditation of educational qualifications, which often led to new training and occupational paths. The time of arrival was also, in this case, decisive, as the legal status had been changed and the process of recognition of educational qualifications from Romanian migrants has been gradually progressing in Italy since their official entry into the EU in 2007, which affected also work trajectories positively (Croitoru, 2018). The introduction of the Romanian Qualification Framework in 2013 was a key initiative to promote the recognition and valorisation of formal qualifications among Romanian movers in Europe and to harmonise assessment and certification procedures (Eurydice, 2019).

The analysis carved out three major professional fields for SG1 and SG2 respondents who had experienced vertical skill transfer in the host country. The enlargement of the EU in 2007 facilitated access for Romanians to competitions for labour positions in the public system, which became one of the major professional fields for highly specialized professionals from new EU member states, especially in the health sector.

Other than their daily and ordinary work life, volunteering activities or second jobs often complement the



**Figure 3.** Professional paths and skills valorization.

work–life routine of migrants and represent an important link to the country and culture of origin. Further to this, Vouyioukas and Liapi (2013, p. 93) consider volunteer work as “part of a reskilling process” that permits them “to capitalise on their experience, reorient themselves.” SG1 respondents in particular are often professionally involved in transnational activities. Vertovec (2004) calls it “bi-focality” and points to the here-and-there perspective that migrants apply in their personal and professional context, and thus in their daily life, and might impact decisively the context and persons surrounding. In fact, several Romanian respondents engage in transnational activities that represent local reference points for the Romanian community in Turin, as exemplified by the following narratives of two SG1 respondents:

I am a migrant guide...and I basically tell the story of migration from the perspective of a migrant. The guides are all immigrants, all foreigners, and thus people arrived from other places, who tell...their story of migration. (SG1, female)

This respondent shows her host community to the *Torinesi*, to migrants, foreigners, tourists, and everybody else interested in hearing and seeing through the transnational migrant lenses.

Another SG1 study participant works for a Romanian radio in Turin:

We play international music, but there is a dedicated time for Romanian folk music much loved by the Romanian people....[The radio] focuses on the Romanians...but now they have also thought of a programme in Italian because...the Romanians got married to Italians, so the Italians are obliged to listen to the Romanian radio...then the director thought

of some contributions in Italian, two or three times a week.

Those transnational communication networks do not solely represent a link to the country of origin and diasporic identity, but also tie the communities in the host context.

Due to the privileged standing of the German language in Italy and the increased formal recognition of their competences, the majority of German respondents (SG2) worked in the educational sector, either public or private, even though this was not coherent with previously acquired competences and educational credentials. In this context, the notion embraced by Liu-Farrer et al. (2021) and Sandoz (2020) of social construction and the context-dependence of skills is relevant. Accordingly, skills are not an intrinsic quality owned by the individual, but rather assessed, developed, and identified subjectively by the migrant context, which explains the interplay of chances and choices for the migrant in certain occupational segments.

As a result of insufficient language skills at the beginning of the mobility trajectory, German language teaching was rather often a valid alternative to start the working trajectory for many SG2 respondents. This development was facilitated by the increasing demands for language instruction and socio-linguistic competencies promoted on national and supra-national levels (COE, 2020) and the preference for mother tongue (assistant) teachers in public and private schools (Schroot & Marroccoli, 2021). The latter was often embedded in the migratory context, where study participants worked as German language instructors predominantly for Italian professionals with intentions to leave their country. Interestingly, their Romanian counterparts were professionally well inserted in the same occupational

field. However, in contrast to the German sample, they focused on language and the cultural instruction of their co-nationals rather than of Italians.

Whereas professional downward mobility, the change of job status, or occupational fields conditioned socio-economic upgrading for most SG1 respondents, this was not the case for SG2 respondents, who were facing lower salaries and often higher living costs in Turin compared to their home context.

In contrast, horizontal skill transfer and thus a geographical re-location of acquired cultural, educational, and professional capital and professional fields was observable in particular for the Italian sample group in Germany (SG3). The majority of respondents referred to a rather linear progression of their professional path in the same—or very similar—occupational field. Their professional trajectory had been typically initiated with higher education in their country of origin and was continued with several years of work experience in the same national context or abroad.

## 6. Conclusion

This research project departed from the need for empirical investigation on professional integration dynamics of qualified labour within intra-European mobility. For this purpose, work trajectories of high-qualified movers have been analysed and theoretically framed by the life course approach and a transnational perspective on (professional) integration dynamics in the light of the three heterogeneous (more and less privileged) national and cultural backgrounds of the respondents.

The data analysis points to two distinct interrelations: first, between the initial migration motivation to move to Germany or Italy and the corresponding skill valorisation in the host context, and second, between conditions in the country of origin and destination for potential brain valorisation.

Concerning horizontal and vertical competence valorisation and corresponding professional down and upward mobility in the host context, data suggests that (a) the geographical origin of the migrants, (b) the stable economic and socio-political standing of the host context, and (c) migration motivations steered their insertion in the labour market decisively. Professionally motivated mobilities reveal fewer alterations within the professional trajectory and the related (cultural) capital implementation than those migrations motivated by lifestyle change and family reunification.

Accordingly, a high share of skilled labourers who reach the country under more or less favourable circumstances are often forced to work in job segments that are often incoherent to their background and prevent them from using the total of their human capital.

This research has faced some limitations, which could be approached and tackled in further investigations.

The sample of this study comprised data from 30 respondents, which is considered a rather small sam-

ple size that needs cautious formulations of interpretations and findings within the established systematic analysis framework. To elaborate further on key issues such as social up and downward mobility and professional aspirations, a larger sample would be helpful and corroborate several insights. Further, the adding of return and onward mobility intentions would provide an interesting perspective in light of the life course paradigm and should be further elaborated upon. Recent comparative studies (Croitoru, 2018; Williams & Baláž, 2008) that focused on the interrelation of skill valorisation and return migration provide interesting insights and tools to investigate how professional up or downward mobility in the host context affects intentions for onward or return migration.

Finally, part of the data collection has been conducted in a pre-pandemic phase. It would be highly beneficial to add a perspective that takes post-Covid dynamics related to labour market insertion and the professional inclusion of qualified migrants, on a micro (individual) and macro (policy) level.

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## Conflict of Interests

The author declares no conflict of interests.

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Article

## Female Solo Self-Employment in Germany: The Role of Transitions and Learning From a Life Course Perspective

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### Abstract

Based on a qualitative analysis of 12 solo self-employed women's work biographies, this article investigates the (re)structuring effects of solo self-employment on the professional and private lives of women in Germany in their mid- and late-career stages. While solo self-employment has been gaining significance in the German labour market in the last two decades, it is largely an underresearched subject from the perspective of female labour market participation. Our study shows that the transition to working solo self-employed constitutes a marked break in female work biographies with lasting restructuring effects on their life courses. Constituting a deviation from the female standard life course, this move can be understood as a coping strategy of biographical discontinuities, which translates into specific patterns against the background that women (still) assume most of the care and housework responsibilities. How the transition to solo self-employment is being prepared and managed and what role learning and risk management play in the transition process is the focus of our article. Our aim is to better understand the underlining rationalisation logics of female solo self-employment in terms of labour market participation, reconciling work and family life, and professional self-realisation. While in the German welfare system solo self-employed bear higher risks of precarity and financial old age insecurity, solo self-employment is functional as an individual strategy for action, giving women the opportunity to do justice to their (mid) life courses and intrinsic needs to pursue both professional work and freedom of choice when and how to work. This may act as a corrective for gender inequalities in the world of work, especially when it comes to working in a self-determined way.

### Keywords

female work biographies; Germany; hybrid employment; solo self-employment; work autonomy; work transitions

### Issue

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### 1. Introduction

The emergence of new forms of flexible work, the blurring of work boundaries, and the spread of non-standard employment form part of the dynamic labour market restructuring of the past years (Eichhorst & Marx, 2015). Of these dynamics, part-time work and marginal employment are particularly characteristic of women's employment (Haasler, 2016a), often aligned with precar-

ious employment. In this context, solo self-employment, which has grown in significance in Germany in the last two decades, has also come more into focus.

While forms of (solo) self-employment are very diverse and difficult to assess (see Section 4), all solo self-employed people provide services for the market or a client in return for payment in a sole business (i.e., without employees). To that extent, they can be regarded as a special category of employment in distinction to classical

entrepreneurship or self-employment, which typically operates with employees (Pongratz, 2020). In Germany, solo self-employment is closely linked to the flexibilisation and destandardisation of employment, the expansion of the service sector, and hybrid employment (Bührmann et al., 2018; Kay et al., 2018). For our study, two developments in solo self-employment are of particular interest: (a) the proportion of women, which has been rising continuously and roughly doubled since 2000 and (b) the change in age structure, which resembles the growing labour force participation of older persons (over 50 years to beyond working age) and whose share in solo self-employment has grown to almost 50 percent (Brenke & Beznoska, 2016, p. 21).

Our article examines how solo self-employed women in the second half of their working lives depict their careers throughout their life course. Our aim is to better understand what solo self-employment means to female labour market participation and how it impacts their work biographies. Based on interviews with solo self-employed women aged 45 to 69, we ask, first, about women's routes into solo self-employment and their motivation. Studies have analysed solo self-employment of women as either a preference-based strategy for combining care and paid work or as a last-resort-strategy when dependent employment is not accessible (Bari et al., 2021; Besamusca, 2020; Ferrín, 2021). We investigate whether this holds true for our sample. Second, we examine how our interviewees organise their current work situation and whether specific challenges, including precarity, can be associated with solo self-employment. Here we address aspects of (self-)organisation, the combination of different forms of employment, employment and income (in)stability and (in)security, the compatibility of work and family, and work autonomy and professional self-realisation. Finally, we ask what role education plays for female solo self-employed and the meaning they attribute to learning, thereby connecting the role of lifelong learning with the life course perspective (Meliou & Mallett, 2022). With this approach, we aim to identify individuals' rationalisation logics such as labour market integration, compatibility models, or professional self-realisation with greater work autonomy typically related to solo self-employment. For solo self-employed, the maxim of active and rationalised control of the use of one's own labour is constitutive (Böhle, 2002). This interconnects with the economic framework conditions and the market as a place to prove oneself. The labour market, in turn, is shaped by global developments such as the growing importance of the service industries and the digitalisation of work. For solo self-employment, it is relevant that digitalisation has increased opportunities for working solo self-employed in the creative and knowledge-intensive industries (often based on telework), while the growing importance of personal social services provides work opportunities that are attractive to women.

The article is structured as follows: First, developments of solo self-employment in Germany in the context

of multiple employment are presented. This is followed by a description of the methodological approach and sample description and the presentation of the results. The article concludes with a discussion of the empirical results in light of the outlined research questions.

## 2. Country Context

During the last 20 years, the number of self-employed in Germany moved to around four million, which corresponded in 2018 to just under 10 percent of the working population (Statistisches Bundesamt, 2019, p. 359). Of this, the share of solo self-employed was slightly more than half, characterised by a steady increase between 1994 to 2012 and a growing share of women (from 31 percent in 1991 to 42 percent in 2020; see Bonin et al., 2020; KfW Research, 2020a, 2020b). With a self-employment rate of 9.6 percent, Germany thereby ranks fairly low compared to the European rate at 15.2 percent (OECD, 2022).

The reasons for the expansion of solo self-employment in Germany are manifold. On the one hand, in the course of labour market flexibilisation and rationalisation, tasks and services were increasingly outsourced by companies and public authorities since the mid-1990s. This concerns, for example, personal services, further education, transport, and logistics as well as production. On the other hand, the expansion of the creative industries and knowledge-based services supported by the diffusion of digital work and communication has opened new areas of activity for solo self-employed (Statistisches Bundesamt, 2019). The increasing importance of the service sector in the overall economy plays an important role, too, which is reflected in abundant start-up activities (KfW Research, 2020a, 2020b). In addition, start-ups and solo self-employment were subsidised and promoted by the German state during phases of cyclical high unemployment (especially in the mid-1990s and from 2002 to 2005).

During the upswing in solo self-employment, we could also observe the expansion of part-time employment and the low-wage sector combined with labour market deregulation. While since 2012 the number of solo self-employed has been slightly declining due to reasonably good employment prospects and low unemployment rates, the proportion of older solo self-employed has been rising steadily. Today, people aged 65 and over account for around half of all new entrepreneurs (KfW Research, 2020b). Solo self-employed in this age group often work in higher-skilled jobs with relatively high hourly wages, suggesting that solo self-employment is increasingly being used as a way to postpone retirement or to keep on working while drawing an old age pension (Engstler et al., 2020).

At the individual level, solo self-employed workers exhibit a wide range of qualifications, income, jobs they perform, and material and social security statuses. Despite this great variation, all self-employed and solo

self-employed work for their own account and thus bear the entrepreneurial risk. In addition, and in contrast to dependent employees, they are for the most part not included in the German social security system and thus finance their health insurance and old-age provision without employer support or contributions. In the last years, we could observe the highest increase in the largely female-dominated artistic, domestic, educational, and social occupations as well as in cleaning and some manufacturing professions (e.g., carpenters, plumbers, opticians, technicians). In addition, the proportion of solo self-employed is increasing in high-qualified academic occupations (Bonin et al., 2020). Looking at income by occupational groups, academic professionals for finance and administration, engineers, lawyers, and IT workers achieve the highest incomes, whereas hairdressers, cooks, waiters, cleaners, and people in nursing and health professions rank at the lower end (Brenke & Beznoska, 2016). Due to the gender-specific segmentation of the German labour market by occupation (Haasler, 2016a), the income of solo self-employed women is particularly low and often comparable to the income of employees in the low-wage sector. The high rate of part-time work, which amounts to about 50 percent among female solo self-employed (Bonin et al., 2020, p. 34), also correlates with low income. In contrast, men dominate among the high-earning solo self-employed (Mai & Marder-Puch, 2013). While the gender income gap is higher for the self-employed than for dependent employees (Gather et al., 2010), solo self-employment is also characterised by higher risks in terms of social security and poverty in old age (Bühmann & Pongratz, 2010). Whereas a portion has some level of capital, property, or other forms of material security (Brenke & Beznoska, 2016), about two-thirds cannot build up savings from their current income (Bonin et al., 2020, p. 42). Many start their solo business without additional capital and only about one in five solo self-employed has working capital (KfW Research, 2020b). Regardless of the occupational field and income level, less than half of all solo self-employed have retirement provisions based on regular insurance payments (Brenke & Beznoska, 2016, p. 53), which means that any assets also function as retirement provisions.

### **3. Theoretical Framework: Hybrid Employment and Solo Self-Employment**

Solo self-employed show not only great heterogeneity in terms of their qualifications, professional activities, and income but also the nature of solo self-employment can vary considerably, involving, for example, micro-entrepreneurship, freelance activities, contracted jobs, or start-ups (Mai & Marder-Puch, 2013). For solo self-employed, a combination of jobs and forms of employment, including a combination of dependent and self-employed work, is more frequent than for all other employment groups (Brenke & Beznoska, 2016; Kay et al.,

2018). Particularly when solo self-employment alone cannot generate sufficient income, attempts are made to cushion income risks through multiple employment. This situation has increased significantly in recent years (Bonin et al., 2020).

In Germany, the (simultaneous or consecutive) combination of different forms of employment has been discussed for some years as a key element of the transformation of work and as closely related to the expansion of solo self-employment (Bögenhold & Fachinger, 2013; Bühmann et al., 2018). Forms of hybrid employment are furthermore connected to the destandardisation of employment (including the erosion of classical entrepreneurship), leading to increased discontinuities in both self-employed and dependent employment (Bühmann & Pongratz, 2010; Eichhorst & Marx, 2015). While at the structural level these developments are blurring the boundaries between different kinds of employment, employment discontinuities induce new precarity risks for both self-employed and employed workers.

At the individual level, hybrid or multiple employment often follows a strategy of diversifying employment opportunities to secure individual or household income. Solo self-employed hence seek to enhance their employment security and continuity of labour market participation and income by combining different employment arrangements. Multiple employment is furthermore a reaction to higher precarity risks and insufficient social security. The typical trade-off is that dependent employment offers greater employment stability, predictability, and social security, while solo self-employment provides for greater flexibility and self-determination at work. At both the individual and household level, the combination of secure and flexible employment can be understood as a “support leg-free leg” strategy, particularly when work and care responsibilities are to be aligned. In addition, the combination of different forms of employment may facilitate the expansion of professional networks, which plays a major role for solo self-employed (Gottschall & Kroos, 2003). At the same time, combining different forms of employment requires a high degree of organisational ability, which can easily turn into a significant stress factor.

From a life course perspective, hybrid employment may not only represent a transitional situation but is increasingly observed as a permanent arrangement, leading to the multiplication of known and established career paths (Fachinger, 2014). The work biographies of solo self-employed are particularly characterised by discontinuities. They use solo self-employment to reconcile career and life plans with labour market requirements in flexible ways, thereby exploring different types of employment and crossing the borders between them. Analysing the working lives of solo self-employed women from a life course perspective allows us to consider past experiences and processes to understand their influence on an individual’s current work situation (see, for example, Elder et al., 2003). Additionally, the life course can

be seen as a system of rules to which individuals orient themselves and align their actions. In that way, it structures their everyday life and biography (Kohli, 1986). This perspective supports understanding the structuring effect of solo self-employment on female work biographies and the rationalisation logic that can be associated with it (and vice versa).

As female labour market participation is steadily rising, the gender model has changed and today can be described as a modified male breadwinner model. The institutionalised life course of women was not explicated in the founding texts on the life course approach but typically follows a pattern of (a) education in childhood and youth, (b) a period of full-time employment, (c) unpaid care work after marriage and birth of children, and (d) return to part-time work or permanent homemaker. Hence, women are still mainly responsible for family care, and paid work is mostly pursued part-time. We follow a gender-integrated life course perspective as formulated by Krüger and Levy (2001), focusing on the interconnection between individualisation and institutional structuring of the life course and the complex configurational obligations in female biographies. Due to care and family work, complex relational dependencies arise for women that generate specific patterns of work biographies (Conen et al., 2016; Gottschall & Kroos, 2003). Moen (2010, p. 9) calls this the “gendered life course” because the modified male breadwinner model is ingrained in state and business policies and practices as well as in expectations and assumptions about paid and unpaid work, which lead to the institutionalisation of different life courses for men and women. Against this backdrop, we consider female solo self-employment as a possible coping strategy for biographical challenges and work transitions.

#### 4. Data and Methodological Approach

The empirical assessment and statistical recording of the situation of (solo) self-employed is particularly challenging due to low case numbers, hybrid and changing forms of employment, and strong income fluctuations, among other issues (Bonin et al., 2020; Gather et al., 2010). Since survey programmes show many deficiencies in accurately assessing forms, constellations, and material circumstances of self-employment, qualitative studies can be a valuable approach to complement quantitative assessments.

For investigating the rationalisation logic and structuring effect of solo self-employment in women’s life courses, we combine a qualitative secondary and primary analysis based on 12 semi-structured interviews with solo self-employed women in their mid- and late-career stages. Four of these interviews were taken from a research project funded by the German Science Foundation (DFG), looking at employment after retirement age in Germany and the UK (Scherger et al., 2012). Five interviews came from a European study on learn-

ing for career and labour market transitions (Haasler, 2016b). These nine interviews were re-analysed for this article. Both projects did not focus on women working as solo self-employed but concentrated on female work biographies and contained longer biographical narratives. In these work biographies, the transition to solo self-employment was analysed to constitute a marked biographical turning point that overshadowed other life events such as reaching the state pension age. This observation provided the impetus for our secondary analysis presented here. In addition, we conducted three interviews for this analysis based on a newly developed interview guide, which included the themes of the data already collected as well as setting a special focus on solo self-employment.

In the literature, the integration of new data and data already collected in other contexts is referred to as “assorted analysis” (Heaton, 2008, p. 39). Secondary analysis of qualitative data is not yet widely used but provides a useful approach to analysing rich material and exploiting existing data. Frequently discussed challenges in secondary analyses of cross-project data are the diversity of research questions, research designs, and methods (Medjedović, 2010). For this reason, the prior examination of the fit of the data should verify that the topic of the secondary analysis is covered by the original studies and that the data collection methods of the primary study do not limit the secondary analysis (Medjedović, 2010, p. 87). The data assessment for our secondary analysis showed that the thematic proximity, as well as the similarity of data collection instruments, were given. As the authors were involved in the research projects where the data were collected in the first place, they had access to the interview material and were informed about the contexts of origin. Against this background, we developed the research questions, being aware of the explorative character of our study and the limited scope of our results.

The secondary data analysis design set the framework for our sample selection criteria. Interviews were included when the interviewee was, at the time of the interview, (a) solo self-employed, (b) female, and (c) over 40 years old. For the newly collected data, a selective sampling followed the same selection criteria. All interviews were semi-structured and gave interviewees room to address topics they considered relevant and to outline their work biographies. They were fully transcribed verbatim, anonymised, and analysed in a two-step procedure: In a first step, the interviews were coded, whereby the first coding round was more open and the second analytically oriented towards the research questions (Saldaña, 2013). Both inductive and deductive coding rounds aimed to capture the thematic range of transitions and work experiences in the institutional context of the life course. Since coding is usually a dissecting method, individual case reconstructions were written in a further step to keep the entirety of the case in view. Both evaluation steps were used to answer our research

questions. Analytically, more in-depth evaluation methods could not be used because of the secondary analytical approach.

Our sample covers an interesting range of professions, age groups, and family and employment constellations (see Table 1), representing some key developments of female solo self-employment: Interviewees either work in creative fields (copywriter, sculptress, dressmaker) or provide personal services in so-called “semi-professional” areas (midwife, speech therapist, physiotherapist). The courier driver represents the expanding low-wage sector. Overall, the qualification level of the sample can be described as intermediate. Six interviewees are working in the area they trained for, two have no recognised professional qualification, and the rest studied mainly at a university of applied sciences. Except for two women, all have been working as solo self-employed for a relatively long period (nine of the 12 for more than 10 years) and are well established in their professional field. The four interviewees from the DFG-funded project represent the growing proportion of self-employed women working past pension age.

## 5. Results

For the presentation of findings, we have divided our results into three thematic sections: First, we discuss the transition to solo self-employment; second, we describe how the current work situation is organised and perceived; finally, we present the meaning of learning and further training for women working solo self-employed. One overarching finding frames our results: The life course perspective reveals that all interviewees started their working life in dependent employment. This early experience constitutes the framework of reference as “normal” or “typical employment” for all subsequent biographical decisions and reflections. “Normal employment” was in all cases negatively connoted.

### 5.1. Transition to Solo Self-Employment

Solo self-employment as the only solution when not finding dependent employment as it is often portrayed in the literature (on pull and push factors into self-employment see Ferrín, 2021), did not emerge in our study. Our analysis shows that the main drivers for working solo self-employed are working in a self-determined way or escaping from a dependent job that is perceived as restrictive. Two biographical patterns become visible in our data: One group of interviewees moved into solo self-employment after a longer period of dissatisfaction with a dependent job to then continue working on their own account. The other group changed back and forth between independent and dependent employment. Among the first group, the transition to solo self-employment is described as a radical change in their career, typically linked to a preceded break due to further education, unemployment, or a family-related employment interruption. This caesura was described as a turning point that opened up new possibilities to reflect and try out new directions that were perceived impossible when working in dependent employment. The midwife describes her transition as follows:

[I] was unemployed for a while and I also had a two-year-old child, so I didn’t really have much pressure then. But when he was with his dad a lot [after their separation]...I was very bored. I applied, first to the clinic, and then I saw this advertisement from [association of self-employed midwives] and already knew how they worked because I had done an internship with them during my training. And yes, I thought, yes, that’s great, because now, I actually have the time and I also totally want to, and now I’m going to apply there....And this topic of self-employment was a big one, I think, because I just don’t like this feeling that someone decides for me.

**Table 1.** Sample overview.

Age	45–54	7
	55–64	1
	65+	4
Qualification	No vocational qualification	2
	Vocational qualification	6
	Vocational qualification and higher education degree	2
	Higher education degree	2
Family status	With partner, no children	2
	With partner and children	7
	Single/divorced with children	3
Transition to self-employment	After completion of initial or further training	2
	From unemployment	2
	After career break due to caring responsibilities	1
	From dependent employment	7

I can't deal so well with authorities. (Ip2, translated from German)

Most interviewees portrayed the transition to work solo self-employed as a well-considered and long-planned step. Typically, the transition was organised without any kind of institutional support, special know-how, or experience; however, support from the partner, relatives, or friends was always vital as the historian illustrates:

I only did it together with my husband. Well, okay, a friend of mine, who is a web designer, said he would finish the homepage. And otherwise, yes, with my husband and a friend who was also very good. She helped me in the beginning. But financially, for example, not at all, because I basically didn't need anything. I already had a computer and that's why it wasn't necessary. (Ip11, translated from German)

The women evaluated this move as positive and drastic, which the physiotherapist describes as follows:

I really enjoyed this further training [in osteopathy], and I actually wanted to work with it, but I didn't see any chance of being employed somewhere and then having one patient after another every 20 or 30 minutes. I was no longer prepared to do that. So, basically, the only thing I could do was to work self-employed. The children were out of the house, there were free rooms in the house, the whole children's wing in the back, and then I went through with it. It was difficult, but it worked. And today I'm self-employed....I've been self-employed for ten years at the beginning of the year, and it's really been worth it and I'm glad I did it. (Ip4, translated from German)

Other motives included the rejection of hierarchies, being able to determine the monetary value of one's own work, and having control over working hours. These reasons were also mentioned by the interviewees with biographical discontinuities and who had frequent changes between dependent and independent employment. Self-fulfilment and being able to shape one's own working conditions remain other central motives.

The close interlinkages between work and family life also came out strongly. Quantitative studies show (for example, Conen et al., 2016) that the compatibility of work and family life can act as an important motive for working solo self-employed. However, in our sample, only one interviewee emphasised the better alignment between caring responsibilities and work as a reason to work solo self-employed. The childcare worker described her transition as follows:

Yes, and then I was at home, and I don't think I had been at home for a month when the bell rang for the first time, they had heard I was at home, and that I was a nursery school teacher and whether I could

look after their children for a few hours. And [her child] was 14 or 15 months or so. And then I started with a few hours a week, I think two mornings....That was a really good time, so I would do it again any time. (Ip2, translated from German)

This interviewee had quit a dependent job because it was incompatible with taking care of her infant. She then realised that working solo self-employed as a childcare worker would make it possible to combine paid and family care in a more comfortable way. In our sample, however, this was the exception. The more differentiated picture reveals that some women could only work independently when their children were older or had moved out, or only with a well-functioning (family) support network, such as the midwife, who moved closer to her parents before taking up solo self-employment. These women did not decide to work solo self-employed to better align family responsibilities as so-called "mumpreneurs" to meet both norms of being a good mother and a good worker (Besamusca, 2020, p. 1285). Rather they made the transition to solo self-employment despite having caring obligations or they waited until they felt the time was right. Hence, decisions for and organisation of solo self-employment are highly intertwined with family arrangements as the quote from the dressmaker underlines:

So, but of course the family supported me a lot. My children were really great, too. My husband and my whole family, my siblings, my parents and so on. I couldn't have done it without them, not at all. (Ip10, translated from German)

Notably, our sample represents women in the second half or at the end of their careers who have been in solo self-employment for a relatively long period. The pattern of short-term self-employment due to lack of alternatives may therefore not be represented.

## 5.2. Work Organisation and Working Conditions

To better understand the specific challenges associated with solo self-employment and how these are managed, we look at how independent work is organised and perceived. As discussed in the literature (see Section 3), hybrid employment in Germany is closely connected to labour market flexibilisation. Several women in our sample reported phases during which they worked solo self-employed and were holding dependent employment at the same time. Two of them described this constellation as an involuntary and transitional arrangement to stabilise their financial situation. Some interviewees described their solo self-employment as project-based, thereby pursuing several solo self-employed activities at a time. The music teacher, for example, directs a choir, organises musical activities for dementia patients in nursing homes, and works as a freelancer in early music education at the music school. This diverse portfolio of work

activities can be by own choice or to stabilise the financial situation (for a similar discussion of the portfolio careers of cultural workers see Stokes, 2021).

The women, who represent the sub-sample with frequent changes between independent and dependent work arrangements, evaluated their discontinuous work biographies differently: Some described their paths as self-determined, underlining that their professional goals could be better realised through self-employment or dependent employment at a given point in time. In these descriptions it becomes clear that individuals actively direct their work biographies. Others described their paths as arduous and characterised by compromises, with earning a living having been the key concern for many years. Nevertheless, in these cases too, independent work has a positive connotation and stands for self-determined work characterised by creativity and autonomy, thereby giving women the opportunity to do justice to their life courses and intrinsic needs to pursue both professional work and freedom of choice when and how to work.

As interviewees generally underlined great satisfaction with working independently, negative aspects were mostly hinted at in minor comments and only substantiated when followed up by the interviewer. “Working hours” was a recurring theme discussed in different facets. Three of the four pensioners and one other interviewee had opted to work part-time. For the historian, the reconciliation of care and work thereby was in the foreground, whereas for the pensioners work–life balance more generally was the main reason. Furthermore, irregular working hours due to fluctuations in order situations, working despite being ill, and taking less time off than desired (e.g., for holidays) were other issues frequently addressed. The issues revolving around working hours (despite being able to self-direct working time) reveal a particular challenge of solo self-employment, not least due to the absence of legal regulations on working hours and holiday entitlement. Interestingly, nobody in our sample reported longer periods of no work due to order fluctuations. Overall, all interviewees were confident that they could revert to their established networks and/or would have a financial cushion to bridge a lean period. This means that while order slumps were perceived as a possible risk, this did not have a structuring effect on the organisation of work and daily activities. This even holds true for the interviews conducted in April 2020 at the time of the Covid-19-related lockdown in Germany, which threatened the existence of many solo self-employed. Also, for these individuals, the work base remained stable, although some had to change their work practices like in the case of the midwife, who started to give virtual courses, or the sculptress, who lost a long-standing independent job but who quickly found a new job in another institution:

However, I already had a new job at the end of the week. So, I could start immediately in a salaried posi-

tion, which is not the worst thing now in the times of Corona. But as an artist, and as a freelance artist, that also means a terribly low, terrible salary and more hours of work. That means I work there now ten hours more a week and earn less. (Ip3, translated from German)

Interviewees appreciated that independent work can be financially rewarding and may give them some leeway to negotiate rates and remuneration. However, the downside is lower income security, which relates to higher social security risks. Our interview partners mainly worked in typical female professions such as childminding, speech therapy, midwifery, or physiotherapy, all of which are characterised by lower pay in relative terms (Hall, 2012). This is reflected in insufficient provision for old age. While some can negotiate good rates, others are confined to fixed rates, as was the case for the midwife and the childminder, whose remuneration rates are determined by the health insurance funds or the municipalities.

As addressed in other studies (Bührmann & Pongratz, 2010; Conen et al., 2016), linkages between solo self-employment and precarity could be identified along different facets. The two single female pensioners stated that they could only live very modestly on their pension and needed the additional income to lead a comfortable life. This includes the 78-year-old tutor:

It is so that I could just about live on my pension, but there must not be any big expenses and I could live in such a way, let’s say, that I could then just move around here, so to speak, within my four walls. So, I think gym would not be in it, I don’t travel much now either, because, according to the motto, either I have time and no money or no time and money. But what is also important for me is that you simply have the feeling that you don’t need anyone. You really have such a small cushion at a minimal level. (Ip7, translated from German)

Interviewees who lived in a partnership were financially more secure in the household context, whereby three interviewees explicitly mentioned higher levels of economic security through their partner’s (higher) income. Some respondents also mentioned little financial reserves and leeway, which could be also an indication of precarity. Another issue related to solo self-employment is higher social risks, including health and unemployment risks, in old age. While in Germany very few occupational groups are covered by compulsory pension insurance (like the midwife and daycare provider in our sample), the vast majority of solo self-employed need to take care of private insurances to not bear high risks of precarity. As this provides a major challenge for most solo self-employed, a considerable number is not adequately covered (Conen et al., 2016). Solo self-employed often lack relevant knowledge and

competence to take care of adequate pension provision themselves. While some interviewees mentioned a financial cushion through real estate property, life insurance, or other sources of old-age provision, continuing to work after having reached the state pension age also came out as a viable option, pointing to the symbolic nature of state pension age for solo self-employed.

Despite some indication of precarity, the 12 solo self-employed women in our study assessed their labour market participation overall as stable and, for the most part, financially secured. This may be due to the fact that our sample represents a specific and established segment of female solo self-employment, as all women had been working independently for a longer period. The perception of financial stability, however, does not rule out higher risks of precarity, as individual risk perception may deviate from actual risks of precarity, including those related to old-age security.

### 5.3. The Meaning of Education and Learning

Another recurring theme in our interviews related to education, learning, and further training, all of which fulfil several key functions for solo self-employed. While according to the literature especially low and highly qualified women work self-employed (Ferrín, 2021), our investigation shows that sustainable solo self-employed careers can also be built on intermediate qualifications. However, what our examination also shows is that these women go on a long journey, moving back and forth between paid employment, education, and further training, until they find their place in the world of work (for a similar discussion see Meliou & Mallett, 2022). The speech therapist illustrates this journey as follows:

Well, I finished school in 1979, that is, secondary school. But I was already, ah, it was at the same time that I also already moved out of the house. And I had always worked in a self-managed youth centre on a fee basis and financed myself through that....And then I did a kind of pre-study internship for a year in a kindergarten, which, at that time, was a prerequisite for starting vocational training as a nursery teacher. And then I did, well, when was that, in 1982, the graduation was over and then followed another year of recognition. Then I worked in a school of special education...and then I moved to [city]....There I worked from 1983 to 1985 and I just noticed that it didn't fulfil me. Already then, I had an affinity for language and providing support, which prompted me to train as a speech therapist in [another city] from 1985 to 1987. (Ip12, translated from German)

Starting in a female-dominated domain was a dominant pattern in our sample, but also a later career redirection when realising that this had not been the right decision. This pattern reflects the pressure for young women to follow a gender-specific vocational track and career

path. Studies and labour market analyses have shown that this is a result of the specific and persisting institutional interlocking mechanisms between the German vocational education and training system, occupational labour markets, and the German social welfare system (Haasler, 2016a, 2016b; Haasler & Gottschall, 2015). It is not uncommon for women that career redirections also involve higher education after having completed a vocational qualification followed by some years of dependent employment. These transitions related to university education and/or further training can then turn into important "breathing spaces" to evaluate and redirect one's career, whereby solo self-employment may turn into a viable option. Re-training can then be understood as an enabler or prerequisite for working independently.

Apart from acting as enablers for self-employment as a career path, education and training also support female solo self-employment by providing a forum for exchange and networking. They are hence positively connoted and a key source of getting innovative impulses for work and of supporting professional peer exchange that many solo self-employed are missing as they do not have "colleagues." Finally, education and training also foster personal development. These aspects seem to be closely linked to a striving for self-optimisation in the work context as an important motivator. Interestingly, further training was not strategically used to organise and optimise the business aspects of solo self-employment. Bookkeeping and client acquisition were often mentioned as negative aspects of independent work. Interviewees stated that it was difficult for them to deal with the administrative and financial aspects of their work and that this had been the main hurdle that had made them hesitate to move into solo self-employment. Some were frustrated that their education had not prepared them to deal with entrepreneurial tasks, although their domain is often practised that way. Only the sculptress used the support of a financial expert continuously. Lack of skills in handling the administrative aspects in a way contrasts with the reported frequent participation in further training that the interviewees used strategically to stay in business and open up new areas of work activities.

## 6. Conclusion

In the context of dynamic labour market developments and the restructuring of dependent as well as self-employment, solo self-employment, which is characterised by a growing share of women and older workers, is often discussed. For our sample of solo self-employed women in their mid- and late-career stages, the desire to work in a self-determined way could be identified as the main driver for moving into solo self-employment. This transition was almost unanimously reflected as a well-considered step and constructed as an alternative to dependent ("normal") employment. Experiences with dependent employment

were used as the comparative foil to bring the specific demands of solo self-employment into a (coherent) narrative, thereby aligning job demands with individual aspirations and professional expectations. While the individual work situation and arrangements were consistently positively connoted, former dependent employment was typically used as a (negative) frame of reference for all subsequent career decisions and changes.

Evaluating solo self-employment as self-determined and creative was also the dominant discourse of those women, who had moved relatively frequently between self-employment and dependent employment and who displayed (partly involuntarily) discontinuous employment histories. Furthermore, the transition to solo self-employment was consistently experienced as a radical decision that felt “right” at a given point in time to realise professional goals and exert agency over their professional life. Particular challenges due to lack of institutional protection, for example against working overtime and absence due to illness, were also addressed, but rather as “side effects.” In addition, support networks and a safety net through family arrangements played an important role for the respondents as did the aspect of considerable investments in terms of time and social capital, also through network and customer care. To pursue professional and personal development goals, in particular related to building up networks and staying in business, education and training were used and perceived as instrumental, although not to develop specific administrative or organisational competence.

Our exploration of female solo self-employed from a life course perspective highlights biographical discontinuities as well as continuities, the complexity of hybrid employment, and the normative framework of reference of standard employment. It also underlines the intertwining of female careers with family interdependencies, whereby solo self-employment may offer greater flexibility for women to reconcile work and care obligations. Against this background, solo self-employment is functional as an individual strategy for agency and may act as a corrective for gender inequalities in the world of work, especially when it comes to professional self-realisation and working in a self-determined way. In this way, the women, de facto, were doing justice to their (mid) life courses and intrinsic needs to pursue both professional work and freedom of choice when and how to work. Issues of financial security and precarity of female solo self-employed could only be sketched with our approach. Here, more data and detailed analyses of forms of protection are needed. While our study is explorative with methodological limitations, our qualitative secondary analysis revealed commonalities between the individual motivations for moving into solo self-employment with the autonomous, self-determined, and self-regulated aspects of work and labour market participation being the dominant rationalisation logic among the women we interviewed.

## Conflict of Interests

The authors declare no conflict of interests.

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Article

## Peripheral Contingencies: Experiences of International Scholars in Latvia

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### Abstract

This article examines the notion of the academic life course from the perspective of international scholars in Latvia—a research system characterised by “projectarisation,” yet also by aspirations of increased international competitiveness. In conversation with literature on academic precarity and mobility justice, I investigate the contingencies and non-linearities embedded in the transnational movements of research workers. In the academic life course, mobility across borders is supposed to lead to a permanent job in the future, yet often turns into an indefinite process of moving from one country and institution to the next. Based on semi-structured interviews with 29 international scholars in Latvia, as well as other qualitative data, I examine how this contradiction is experienced in more peripheral contexts of academic knowledge production. I suggest that international scholars in Latvia experience heightened job insecurity while simultaneously making use of professional and personal opportunities.

### Keywords

academic precarity; knowledge production; Latvia; mobility; mobility justice; peripherality; projectarisation

### Issue

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### 1. Introduction

Robert and I met at a coffee shop in downtown Riga, the capital of Latvia, for a conversation on a cold winter evening. Having told Robert all the necessary details about my research project on the experiences of international scholars in the country, I started the conversation the way I usually did—by asking him to briefly tell me about his education and work history. Robert laughed a bit and said: “It will take some time because it’s very....It’s not linear, and I think it’s not even common, which doesn’t make it interesting.” Robert’s remark encapsulates the tensions embedded in the contemporary regimes of knowledge production: While linearity may be expected and hoped for in one’s academic career, it is not necessarily common. Simultaneously, an “uncommon” career path is not “interesting”—precisely because it is more common than the often-coveted linear career path. That is, there is a tension between the supposed linearity of the academic career and the non-linearity as

the reality for increasing numbers of research workers all over the world.

How, then, does the academic life course play out in practice in the contemporary regimes of knowledge production? What shapes does it take in national research contexts that tend to be considered peripheral in the larger networks of scientific production? Here, I approach these questions from a very specific angle—that of the experiences of international researchers in Latvia. In conversation with literature on academic precarity and through the lens of mobility justice, I shed light on how the academic life course may play out in peripheral locales of knowledge production. I argue that, in the contemporary academic labour market, research work in Latvia has contradictory effects on the international scholars in the country: While they experience heightened job insecurity, they also find and embrace professional and personal opportunities that may not be available elsewhere.

## 2. Academic Precarity, Peripherality, and Mobility Justice

As social science literature has shown, the neoliberalisation of academia (Nash, 2018; Shore, 2010; Wright & Shore, 2017) leads to a precarious existence for academic workers (Ivancheva, 2015). Spearheaded by the proliferation of fixed-term contracts and the “projectarisation” of research work (Brković, 2020), it takes various forms in different national contexts (Davies & Bendix Petersen, 2005; Gallas, 2018; Heatherington & Zerilli, 2016; Ivancheva & O’Flynn, 2016; Lempiäinen, 2015; Peacock, 2016; Pereira, 2019). Through precarious employment, the non-linearity of the academic life course is thus embedded in the contemporary regimes of knowledge production.

Research workers’ movements across borders are a particularly poignant entry point into the discussion about the (in)justices embedded in the academic life course. Nowadays, mobility across borders is considered an obvious part of a researcher’s life course (Morley et al., 2018). Early career researchers are particularly expected to embrace shorter- or longer-term employment opportunities in countries and institutions outside their own and are evaluated in the academic job market based on their “internationalisation” (Herschberg et al., 2018). At the same time, while these research positions are posited as part of the academic life course that would lead to a permanent position in the future, the only type of academic positions increasing in numbers are fixed-term ones. This leads to what Ferreira (2017) has termed “indefinite mobility” and Vatansever (2018) refers to as “academic nomadism.” These movements may be experienced by scholars themselves—and early career researchers in particular—as forced and exhausting (Carrozza & Minucci, 2014; Manzi et al., 2019; Sautier, 2021; Schaer, 2021).

In this article, I join an emerging set of literature on the movements of scholars to peripheral contexts (Lee & Kuzhabekova, 2018; Luczaj, 2019; Luczaj & Holy-Luczaj, 2022), intensified, I suggest, by the tightening academic labour market across the globe. While I do not engage in the theorisation of the concept of periphery in general or the periphery of knowledge production specifically, in the context of this text I rely on Luczaj and Holy-Luczaj’s (2022, p. 4) positioning of the periphery of knowledge production “as countries with a low overall epistemic impact on global science even though they might have outstanding individual institutions or advanced industrial research centers.” I add two caveats, though. First, I follow Ivancheva and Syndicus (2019, pp. 2–3) in their argument that peripherality “connotes not only a structural or material position...but also a symbolic or performative position vis-à-vis global policy or core locations that become invoked to justify agendas to implement specific policy reforms,” which then results “in self-peripheralizing practices.” Second, I concur with Kojanić’s (2020, p. 50) position that “centers and periph-

eries, and relationships between them, are constantly made and unmade through political-economic processes that operate on multiple spatial and temporal scales, and which can be studied ethnographically.” To sum it up, peripherality in academic knowledge production is both material and symbolic, it is relational and far from static, and it deserves careful engagement.

In this intervention, I also aim to think of the transnational movements of research workers—both those who have found themselves in Latvia and also more conceptually—through the lens of what Sheller (2018) refers to as “mobility justice.” Sheller posits that mobility justice “is an overarching concept for thinking about how power and inequality inform governance and control of movement, shaping the patterns of unequal mobility and immobility in the circulation of people, resources, and information.” Her departure for treating justice as situational and embedded in movements stems from the perspective that “most theories of justice have been sedentary, meaning that they treat their object as an ontologically stable or pre-existing thing, which stands still before it is put into motion.” Sheller thus argues for the necessity to focus, in social analysis, on “the relations, resonances, connections, continuities, and disruptions that organise the world into ongoing yet temporary mobile formations.” For her, mobility (in)justice may occur on any scale and move “across scales and realms,” with various forms of (in)justices being interrelated and constitutive of each other. While, in literature, transnational movements of research workers from one fixed-term position to another do not tend to be approached explicitly from the perspective of justice (but see Morley et al., 2018), I suggest that, in the context of the neoliberalisation and projectarisation of knowledge production, a focus on justice may prove crucial in understanding movements across borders as part of the non-linear academic life course.

## 3. Situating International Scholars in the Latvian Research Context

In their meta-analysis of international academics in peripheral contexts, Luczaj and Holy-Luczaj (2022, p. 4) operationalise academic periphery as a system that is “characterised by at least one of the four following, relatively easy to measure, indicators: uncompetitive salaries, low research allowances...language barrier, and cultural clash between national academic culture and global academia.” Latvia, a country of 1.9 million people in the European East, matches this description. In addition, its research system is also characterised by fragmented academic careers, leading to “a succession of individual jobs, which makes career planning difficult and academic careers less attractive” (Ambasz et al., 2022, p. 12).

As Ozoliņa (in press) posits, since regaining independence from the Soviet Union in 1991, Latvia has undergone several phases in trying to find its place in the global hierarchies of knowledge production: from narratives of democratisation and Westernisation to those of

knowledge economy and innovation, and, more recently, to an emphasis on internationalisation and global excellence. Due to various structural reforms, higher education and research have become increasingly integrated, with quantifiable research output posited as a measure for evaluating the worth of both research institutions and employees (Ozoliņa, in press). At the same time, in 2020, only 0.7% of the country's GDP was allocated to research and development (Izglītības un zinātnes ministrija, 2020). In comparison, the European Union average in 2020 was 2.3%, with Latvia being one of only six EU countries where the research and development expenditure was less than 1% of its GDP (Eurostat, 2021). While this expenditure is expected to gradually rise to 1.5% by 2027 (Izglītības un zinātnes ministrija, 2020, p. 12), and there are ongoing efforts to increase base salaries for academic workers and restructure the academic career model, recent years have witnessed a strong discursive emphasis on the necessity for research institutions and research workers to attract research grant funding, epitomised by, but not limited to, funding offered by the European Union.

This means that academic knowledge production in Latvia is defined by what Brković (2020) calls "projectarisation." Projectarisation, Brković (2020, p. 46) suggests, is "the process of organising the production of scientific knowledge through project cycles that generate 'projectariat'—an increasing number of precariously employed scholars who are also privileged due to their relatively high salaries." In the case of Latvia, projectarisation plays out as the necessity for research workers to remain constantly vigilant for grant funding opportunities. In the Latvian context, where base salaries are low, one's livelihood may quite literally depend on whether a project application is successful or not: the division between grant funding cycle "winners" and "losers" (Berg et al., 2016, p. 170) is particularly stark.

In recent years, the knowledge production system in Latvia has also been characterised by policymaker concerns about the lack of research workers in the country and the low numbers of new PhD holders. Yet again, these concerns need to be situated within the larger context of the projectarisation of knowledge production in Latvia: For instance, most doctoral students in the country do not have structured and predictable funding to support them throughout their studies. At the same time, the lack of workers for longer or shorter fixed-term positions, funded by acquired research grants, means that international scholars have entry points into the Latvian research system, which, in line with other peripheral contexts (Luczaj & Holy-Luczaj, 2022), only has around 3.2% international employees. I now turn to the article's methodological approach and the examination of the experiences of international scholars working in Latvia.

#### 4. Methodological Approach

This contribution, deeply inspired by the ethnographic approach and my training as an anthropologist, is based

on an analysis of qualitative semi-structured interviews with 29 international scholars who currently work or used to live in Latvia. To access potential research participants, I first relied on introductions from colleagues at the university where I work, cold-emailing scholars who had appeared in Latvian media, as well as on a more formal invitation to participate in my research project shared by the state agency funding the research from which this intervention has emerged. After that, I employed snowball sampling to access further research participants, relying on the local networks of my interlocutors who were kind to introduce me to their friends and colleagues. I invited scholars working—or having worked in the past—in various fields and at various academic institutions in the country to participate in my project. I do not discuss the experiences of academics with primary, comparatively stable employment in a different country who were in Latvia as part of shorter or longer-term teaching contracts (for instance, as part of Erasmus+, Fulbright, or other programmes).

While the Covid-19 pandemic made in-person meetings and conversations difficult or at times impossible, in the spirit of "patchwork ethnography," I have relied here on "fragmentary yet rigorous data" (Günel et al., 2020) that emerged both from the formal interviews with my interlocutors as well as the more informal conversations and encounters that followed these initial meetings or emerged in other research settings. The interviews were conducted in English or Latvian, lasted from one to two and a half hours, and took place in person or via Zoom. The interviews were audio-recorded and later transcribed. The informal conversations took place over coffee, via email or on various online messengers, with me catching up and hanging out with my interlocutors, sharing information they may find useful, or responding to their questions and queries about various aspects of employment in Latvian research institutions. While in this article I have mostly focused on the data from the semi-structured interviews, the informal conversations and the furthered acquaintance with some of my interlocutors provided additional perspectives and the continuation of the stories that they shared during the interviews.

The discussion in this article is also informed by the voices of Latvian researchers, university administrators and policymakers. While I do not offer their perspectives in this article directly, semi-structured interviews and informal conversations with them, as well as observations made in public online discussions organised by, for instance, the Ministry of Education and Science of Latvia, have shaped my understanding of the research context I discuss. My own experiences as an early career academic on a fixed-term contract and an employee of a research-oriented university in Latvia also contribute to the perspectives posited in this article.

The names of my interlocutors are anonymised. To protect the anonymity of the research participants, I also do not discuss too many details of their lives

and circumstances, including their research fields or institutions. While most of my interlocutors have doctoral degrees, very few of them have had what may be considered a linear career path. Their work histories had fascinating twists and turns, shaped by the dominant modes of knowledge production and their personal responses to such demands. In this article, I focus on their narratives, and, through their voices, I shed light on the larger conceptual issues embedded in both the governance and experience of research workers' movements across borders.

## 5. Living and Working Academic Precarity in the Periphery

### 5.1. *Situating the Contingencies of Research Work in Latvia*

In previous sections, I have touched upon the notions of peripherality and projectarisation—both as theoretical concepts in the context of academic knowledge production and their specific local iterations—to situate the presence of international scholars in Latvia. I also proposed Sheller's concept of mobility justice as a useful lens through which to analyse the transnational movements of research workers. Mobility justice with its focus on relations, situationality and understanding that "everything, including movement, is contingent on other moves" (Sheller, 2018), provides a helpful framework for examining the lived realities of two mutually constitutive contemporary processes: the academic career non-linearities and the transnational movements of research workers. For this reason, I focus on what may be referred to as the experience of contingency, by which, in the context of this article, I mean the ways international scholars in Latvia make sense of their positionality in Latvian higher education and research institutions. While not necessarily described as such, contingency emerges in my research participants' stories of their presence and employment in Latvia—a pattern shared by international scholars in other peripheral contexts of knowledge production (Luczaj & Holy-Luczaj, 2022). My interlocutors listed various key moments and elements in their arrival and work at Latvian institutions: from professional networks to personal relationships, from lucky encounters with future bosses at international conferences to fruitful exchanges started by cold-emailing and formal job applications, from developing a close relationship with someone from Latvia to one's partner's job transfer. While each person's path is highly individual and personal, as are their aspirations and values, it is crucial to keep in mind that they nevertheless occur against the background of a tight global academic job market. For most of my interlocutors, their positions in Latvian higher education and research institutions were not their first post-PhD contracts. Many had worked in several institutions—on fixed-term contracts in various parts of the world—before moving to Latvia and taking up jobs there.

My focus in this discussion, then, is on the international scholars' experience of the contingency of research work in Latvia, posing an overarching question: How can the mobility justice perspective inform our understanding of the non-linearities of the academic life course in the contemporary world? To consider this question, I turn to the narratives of several of my interlocutors whose voices bring to the fore the contradictory experiences of international scholars in Latvia. By doing so, I highlight how a move to, and life in, a more peripheral locale of knowledge production may both limit and expand one's professional and personal opportunities. Here, I make a distinction between three loosely defined and intersecting groups of scholars: those who arrived in the country in the mid- to late-2000s, those who followed grant funding, and those primarily driven by kin and other personal ties.

### 5.2. *"The Opportunities Were Real"*

I now return to Robert—the scholar mentioned in the ethnographic vignette at the very beginning of this text. Robert has been living in Latvia for more than fifteen years. His arrival in the country and his first short-term contract at a higher education institution there had come about as a result of a combination of two main factors: his interest in the region and a responsive person at one of the institutions he had contacted. Over time, Robert created networks with other like-minded scholars in Latvia and, at some point, joined the department in his field at a larger research institution. His contract since then, however, has always been part-time and dependent on the successes and failures of local and international grant applications. As he put it:

There has always been this feeling that resources are gained day by day. That the basic allocation of resources for the salaries, for research, is extremely low and very much depends on being successful, on winning, basically, projects....Since so much depends on unpredictable resources, when you win the project, you're officially contracted. The problem is that it doesn't really depend on your experience, your results. It depends on these sorts of external circumstances mostly.

Despite these insecurities, Robert considers that living and working in Latvia provides him with "an additional angle and additional edge" when it comes to his research, in comparison to scholars working on similar topics but only visiting the region sporadically. In addition, Robert thinks of Latvia as "a border country" in the sense that it is a place where "Western" discourses may meet and engage with those of the so-called "third countries." For Robert, these opportunities for unique conversations, of a more profound understanding of the region, surpass the insecurities embedded in the terms of his employment.

A similar stance emerges in Gabriel's narrative. Gabriel first arrived in Latvia in the mid-2000s as a doctoral student due to a chance email exchange with a member of the Latvian government at the time. After that, he worked in different locations across the world for several years, but at one point decided to build his professional life in Latvia. While Gabriel's initial arrival, like that of Robert's and most of my research participants, was a matter of contingency, his decision to live and work in Latvia was quite conscious. After all, it involved, as he put it, building extensive local networks—people on whom he may rely if an employment contract did not work out. Gabriel was aware that his former colleagues outside Latvia did not quite understand his decision, but, as he put it, he had “privileged” his quality of life over his “professional career”—as imagined in the linear academic career model that also presupposes the desire to move to the centres of academic knowledge production rather than the peripheries. Gabriel felt that there was a certain openness to “professional opportunities” in Latvia that allowed him to focus not only on the production of peer-reviewed articles but also on societal impact through various public initiatives. He also thought that the potential for a more egalitarian society—in comparison to the contexts where he had worked before—was present in Latvia, and this potentiality strongly appealed to him.

The experiences of Robert and Gabriel reflect those of the scholars who have had ties with Latvia since the first decade of the 2000s. They had arrived in the country during a period when Latvia was trying to “catch up with the West” and “Europeanise” itself in various spheres of life, including the higher education and research sectors (Ozoliņa, 2009, in press). The desire to align the country's development with that of “Europe” also provided scholars like Robert and Gabriel, both with degrees from universities in “the West,” with the opportunity to enter the academic labour market in Latvia at the time and also assume the role of experts and public intellectuals.

As put by Martin, another researcher who, as a comparatively freshly minted PhD had been first invited as a visiting lecturer and then asked to assume much greater responsibilities at a Latvian institution in the mid-2000s, “the opportunities were real...and I took the opportunities.” Martin even referred to this move as a kind of “rebirth”: Despite the multitude of issues he encountered later over the years trying to decipher his work contracts, relationships with colleagues and higher-ups, as well as his place in the Latvian academic system in general, Martin felt that his initial decision to work in Latvia opened up professional opportunities and networks—internationally, not just locally—that may have remained closed to him otherwise. In Latvia, he was invited to “build something new” and represent his institution in professional organisations—he was no longer “zero point something percent” in the hierarchies of his discipline internationally.

Here, I have highlighted the perspectives of scholars who arrived in Latvia during the first decade of the 2000s.

As participants in the global academic labour market and, at the same time, highly aware of the fragmented and unpredictable research context in Latvia, they nevertheless saw the Latvian academic setting as a space for opportunities broadly defined. For them, there was a notion that work in Latvia provided favourable circumstances to do and experience things—within and outside the confines of academia—that were unavailable elsewhere. At the same time, while degrees from “the West” helped these scholars gain visibility in the Latvian context, this visibility does not necessarily translate into predictable income—for several of my interlocutors in this group, it remains fragmented and unpredictable.

### 5.3. *Following the Money*

Along with the shift in Latvian research policies towards “internationalisation,” “global competitiveness,” and quantifiable research assessment (Ozoliņa, in press) from the 2010s onwards, the entrance of international scholars in Latvia has started to take a different, more structured shape, based on the availability of international and local grant funding and with an eye on increasing publication metrics. Employment offers tend to be contingent upon grant funding, at least for the initial fixed-term positions available to international scholars. The contingent non-linearities here are different than those of the scholars who had arrived in Latvia in the mid-2000s, but they are present nonetheless: The early career researchers in, again, an increasingly tight global academic labour market, take the opportunities available to them. The stance of both the receiving institutions and the international scholars hired is more calculated, with institutions aiming to secure labour to meet specific research (or less often teaching) goals, assisted by external funding, and with early career researchers navigating these circumstances to meet their own needs within a precarious labour market.

Thus, for instance, Astrid was happy when her former mentor introduced her to his colleagues in Latvia and suggested she apply for a grant to carry out her research project in Latvia. Having previously worked on fixed-term contracts in different parts of the world, Astrid was quite excited to get the grant and a job in Latvia, which had two major advantages: it was closer to her home country and had a longer contract than her previous positions. Being closer to home meant that it was easier for her to maintain kin ties and take care of parenting responsibilities together with her partner who had not accompanied her to Latvia. Having a contract for several years instead of months meant a “better sense of security and stability....It's good for your career, so you don't have to think about what will happen in six months, or something.” While aware of some shortcomings at her Latvian institution and the fact that, for the institution, her work was a means to reach their own goals within the country's research landscape, Astrid was quite content because her position provided her with the

opportunity to achieve both her professional and personal objectives.

An insight into the opportunities international early career researchers may find in Latvia can also be glimpsed from Ivan's narrative. Having received his doctoral degree in his home country in Europe, Ivan had decided to apply for an EU-wide research grant to carry out a research project in a different country. He felt that, at home, due to "quite strict" research hierarchies, it was not easy to establish oneself as a scientist. Ivan had contacted several institutions in Europe to list as his collaborators for the grant and liked the "enthusiasm" of the potential colleagues in Latvia the most. The grant application was successful—and he attributed this success precisely to the fact that he had applied to work with a Latvian institution. Ivan said:

My colleague who applied in the same year for a Western university, I think, their idea, their application, their names—everything was better than ours. But the reviewer objected—why does this institution need you?...For us, that was super easy to point out, because I needed something, you know, like, the environment where I can realise some new ideas, and, of course, in Latvia, institutions are not as rich as in Germany or the States, so combining some new things, trying something new, usually it's quite a good way to achieve competitiveness...because here the institution cannot just afford to buy 100k in equipment like in the States. So, we need to improvise [laughter].

For Ivan, thus, the professional opportunities offered by work in Latvia lie precisely in the periphery of the country's system of knowledge production. As he put it, "it's much easier to start something" in Latvia because of the necessity to "fight a bit more," to be creative and collaborative in a context where resources are not easily available. While Ivan's continued work in Latvia is both enabled and made precarious by the projectarisation of knowledge production, he sees the comparatively fragile research infrastructure in the country as an opportunity to build his career—and do so in collaborative and innovative ways.

At the same time, it is crucial to remember that, despite the places and opportunities that researchers carve for themselves in the country, the broader context of the precarious academic labour market is what may drive researchers to accept positions in such peripheral contexts of knowledge production as Latvia in the first place. Ruslan's story highlights this factor. Upon meeting his future boss at a conference, Ruslan accepted a post-doctoral research position in Latvia soon after graduating from his doctoral programme in another European country. At the time, he had no plans to stay in Latvia, and, once the contract ended, he acquired another fixed-term contract—on a different continent. As Ruslan put it: "I thought I would never come back." However, once

the contract ended and other job applications did not work out, he got in touch with his former supervisor in Latvia and rejoined the research group—because the supervisor had grant funding for another team member. While Ruslan now, a few years later, has a comparatively secure position at his institution in Latvia as well as his own research funding and opportunities to do work he considers important, looking back at his return to the country he said: "I decided to stay [in Latvia] because I couldn't find a job. Otherwise, my plan wasn't to stay in Latvia."

The voices I have highlighted here represent a group of scholars whose arrival and work in Latvia are a direct result of the projectarisation of the country's research system and awareness in Latvian research institutions about the dwindling numbers of local researchers. It is precisely grant funding that made it possible for these research workers to find jobs—fixed-term ones in most cases—in Latvia. Unlike the scholars described in the previous section, this group of interlocutors tend to equate opportunities with comparative (on a sliding scale) financial security and, in most cases, do not see themselves tied to the country to the same extent as the academics described in the previous and next sections.

#### 5.4. *Following the Heart*

The experiences of scholars with personal ties, such as partners, in Latvia, provide another insight into the specific shapes that the contingencies of the academic life course may take in peripheral contexts. Being "rooted" in a country (Pustelnikovaite, 2020) is not compatible with the "academic nomadism" (Vatansever, 2018) expected in contemporary regimes of knowledge production. It is also important to keep in mind that, while not the focus of this article, care responsibilities and kin ties—as gendered processes—are equally incompatible with the precarity embedded in these regimes (Hughes, 2021; Ivancheva et al., 2019; Murgia & Poggio, 2019; Vohlídalová, 2021). For research workers, following one's heart is not an easy feat. Like Carrozza et al.'s (2017) research participants with "living apart relationships," there were people among my interlocutors whose partners resided in different countries; for instance, such was the case of Astrid whose story was highlighted in the previous section of this text. However, there were also researchers among my interlocutors who had made the conscious decision to be together in Latvia. Deciding to live in Latvia for personal reasons and trying to find one's place within the country's research system also highlights the serendipities and contingencies involved in building one's academic life course. Of course, it is important to keep in mind that my interlocutors were people who had been able to make it happen—who had found employment at higher education and research institutions in Latvia even as they had entered the country to join their partners (or following other kin obligations or aspirations), rather than following grant funding.

Take, for instance, the story of Diego. Diego had arrived in Latvia as a tourist while on a break from his fixed-term research position in a neighbouring country. During this visit, he met the person who later became his partner. Diego decided to move to Latvia to be with this person and, for the first few months of his residence in the country, he did not have a paid research or teaching job. Rather, he assisted his partner with their business and, because the specifics of his research field allowed it, continued to work on his personal research project without an institutional affiliation. After a while, an acquaintance of his partner told him that one of the institutions in Latvia was hiring in his field. Diego applied for the job, got it and was encouraged and supported to apply for additional grant money to fund his position. While he was able to secure a research job in the end, it had not been an easy process: He had contacted other institutions in Latvia but had either received no reply—a common occurrence among many of my interlocutors—or been told that he would have to be proficient in the Latvian language to be hired.

For Sara, the entry into her current research job in Latvia was, to some extent, facilitated by her partner. Sara had met her partner at a research institution where she used to work and the partner happened to visit. Having travelled to Latvia during their courtship, Sara decided that she would enjoy living in the country as it was different from the highly urban environment that had surrounded her before. Following her move to Latvia, Sara was able to continue her work remotely for some time until her organisation was restructured and her position eliminated. Then it was her partner who was able to provide her with some useful tips to apply for a job at a higher education and research institution in Latvia—first as a part-time lecturer and then as a researcher as well. For Sara, then, it was a combination of factors that opened up the opportunity for her to teach in English and then join a research team at the same institution: her partner's knowledge of the academic and research system in Latvia, the internationalisation of higher education in Latvia, that is, the welcome influx of international students in the country (Chankseliani & Wells, 2019), as well as a local need for qualified experts in her field.

English language study programmes also eased Olga's entry into the Latvian research system. Olga arrived in the country with her partner, who had been transferred to a position in Latvia. As Olga and her partner had small children at the time of their arrival in the country, she was only looking for part-time teaching positions. While her professional identity and accomplishments were very important to Olga, due to her partner's job, she did not face financial insecurity. For her, the opportunity to work part-time, at least in the beginning, was a bonus, not an obstacle—and she was able to turn the position into a secure full-time one over time, with the support of her institution in navigating the bureaucratic labyrinths of the process. Overall, Olga thought, aside from administrative obstacles and uncertainties, it

was easier—mainly in terms of publishing criteria—to reach her current career stage in Latvia “compared at least to Western countries,” epitomised in her view by the United States.

While the scholars whose stories I have highlighted in this section also participate in the same academic and research system as the two other groups mentioned earlier, their main reasons for entering the country were personal and kin ties. It is precisely these ties that, on the one hand, limited their career opportunities to one national context but, on the other hand, also facilitated their job search or, over time, made visible context-specific opportunities less accessible elsewhere.

## 6. Discussion and Concluding Remarks

The peripherality of Latvian academic knowledge production is a double-edged sword. On the one hand, it exacerbates the uncertainties and insecurities embedded in academic knowledge production globally—especially for those who may lack social capital in the country and its research system. On the other hand, it may open up opportunities to advance one's career, reimagine one's professional identity in novel ways, or strategically navigate the projectarisation of research work. As put by Martínez (2019, p. 184) in his discussion on the peripherality of the Estonian research context, “to be at the margins is a circumstantial condition that requires particular *muscles*, such as openness to risks and collaborations with unexpected epistemic partners, and also ability to resist and adapt to rapid changes and ruptures.”

Through the experiences of my interlocutors, I have shown a specific configuration the projectarisation of knowledge production may take in peripheral research contexts. Positing that there is a discrepancy between the ideal and practice of the academic life course, my intervention inquired into how it is experienced by international scholars in Latvia. These researchers are workers in an increasingly competitive academic labour market globally and, at the same time, participants in a peripheral research system locally. Due to this positionality, they encounter both global and country-specific insecurities when it comes to finding and retaining jobs, which they then counter through, for instance, network-building and investments of personal resources in attaining research goals. At the same time, through work in Latvia, they also find both professional and personal opportunities. Depending on the time and conditions of their arrival in Latvia, the opportunities may take different forms—from a chance to take up the visible role of a public intellectual to strategic grant acquisition and career planning, from geographical considerations to finding an acceptable balance between one's professional and personal life.

How can Sheller's (2018) notion of mobility justice, then, help us further understand this process? Sheller (2018) writes that “mobility injustices are not an occurrence that happens after entities ‘enter’ a space...but

are the process through which unequal spatial conditions and different subjects are made.” In this article, I have not discussed the most visible and quite real mobility injustices—for instance, Latvia’s mobility regime that has an exhausting effect on researchers who are “third country nationals,” especially those from the Global East or Global South. I have also not focused on the equally important gender dimension of the research mobility imperative or the ways the Covid-19 pandemic reconfigured the (im)mobile subject. And, unlike research participants in Vatanev’s (2022) study of academic labour activists in Germany, my interlocutors did not frame their experiences in terms of (in)justice either. At the same time, it is useful to think of their movements to Latvia—as well as the migration for mainly fixed-term positions of thousands of other researchers in Europe and elsewhere—from the perspective of mobility justice. That is, a focus on mobility justice makes us ask: How just is the insistence of the contemporary regional and global regimes of academic knowledge production for research workers to keep moving? What kind of subjects and what kind of researchers are created through the terms of employment available to most scholars? What uncertainties are exacerbated and, vice versa, what opportunities come to life through various forms of the governance of research work and the governance of movements?

My intervention provides one country-specific glimpse into these questions. It is important to keep in mind that, as Sheller (2018) also reminds us, “mobility justice is as much about how, when, and where we dwell as how, when, and where we move.” It is precisely this relationship between moving and dwelling that I have attempted to capture in this article, positing that dwelling—residing in one place more or less permanently—is not something that transnationally mobile research workers can take for granted. In this sense, the mobility (in)justice that I have emphasised here is profoundly tied to the projectarisation of knowledge production. Brković (2020, p. 38) suggests that the projectarisation of research means that “many researchers who pursue careers throughout Europe may find themselves in the gaps of the fractured and uneven space of European academia.” While Brković’s discussion focuses on anthropologists working in Europe, her argument can be applied to researchers working in other disciplines as well: That is, the non-linearity of one’s academic career, characterised by fixed-term contracts and “indefinite mobility” (Ferreira, 2017), may cause researchers to end up in gaps—created also by particular forms of governance of movement. Investing various professional and personal resources and networks, my interlocutors learn to navigate academic expectations at various scales—all in order not to fall into the gaps that Brković talks about. They may be highly successful in this venture, and to some extent, paradoxically, this success may even be enabled by the peripherality of the Latvian research context. At the same time, the question

remains as to how fair—that is, how just—the demands placed on the shoulders of research workers are.

The academic life course—and the experience of non-linearity as part of it—is profoundly intertwined with policy dreams and aspirations. Both the voices of my interlocutors, as well as my brief overview of the Latvian research context highlight that. The movements, and, of course, lack thereof, of research workers are enabled and shaped by regimes of governance, mobility, and mobility governance. It is crucial to keep asking whether the movements enabled by specific mobility regimes are just for various groups of research workers, rather than the highly individualised ‘ideal type’—and what may be done to make them more so. Approaching the labour and movements of research workers from the perspective of mobility justice may push research institutions, foundations offering research funding, national governments, international organisations, and other actors to work towards prioritising more fair, stable and secure terms of research employment.

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Article

## Later-Life Learning Among Latin Americans in Canada: Toward a Critical Pedagogy of Place

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### Abstract

This article examines interconnections between place-based education and the Latin American Canadian migratory life course. It presents findings of a grounded theory study that utilized in-depth interviews of 15 Latin American Canadian immigrant older adults (55 years and older) who participate in a mobile adult day support programme in northwest Toronto. The study explored the experiences of service-users of place-based education aimed at developing or strengthening their livelihood strategies. Findings revealed that many ageing immigrants view place-based education as a vital resource that supports their ability to access culturally specific and mainstream services, expands their social networks, and can boost their life chances at successive life course stages. However, findings also indicated that immigrants also view place-based education as inadequate and ill-timed and would have preferred greater access to education when they first settled in Canada. The article contributes to emergent scholarship on ageing, transnational migration, and localized education for settlement and integration. Conceptually, it advances a life course justice approach to racialized immigrants' later-life learning by underscoring the utility of integrating a critical pedagogy of place into community education.

### Keywords

ageing; migration; community education; critical pedagogy of place; life course justice; place-based learning

### Issue

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### 1. Introduction

Community education, a key element of Canada's migration regime, is used consistently to support immigrants' (formal and informal) learning and settlement. A related component, place-based education, advances localized and self-sustaining knowledge that is meaningful for the spaces and places learners occupy. At the level of the community, the approach supports processes of education, enculturation, and resilience using learners' real-world experiences. The expectation is that learners will adapt to their communities and become engaged Canadian citizens. The intensification of transnational processes guarantees that migrants will enter a dizzying world of cross-cultural experiences when they arrive in Canada. Over time, they interact with other migrants and create local transcultural communities. These communities are

defined as places in which inhabitants with diffuse, fluid, and multidimensional identities routinely cross cultural and ethnic boundaries and strive toward greater integration, or even disintegration (Epstein, 2012). In transcultural communities, immigrants constantly require new learnings and adaptations to support their long-term integration locally and in the wider Canadian society (Reid, 2019). This is true despite their educational backgrounds, learning styles, and capabilities.

For the past six decades, policies and practices flowing from the ideology of multiculturalism aim to manage difference or cultural diversity within the Canadian population by highlighting the salience of racial and religious ethnic differences among members of minority groups, thereby allowing them to maintain distinctive identities and practices. Such policies have also been central to the development of competencies and the delivery of

education that migrant populations are thought to need to integrate into Canada.

The aim of clause 31(b) of Canada's 1988 Multiculturalism Act is, *inter alia*, "to convey a strong sense of legitimacy to those individuals and communities who feel and/or understand that either their culture or their race has limited their role and acceptance in Canadian society" (Government of Canada, 1988). Central to this aim is the building of a Canadian national identity that is supported by education programmes that offer basic language, literacy, skills training, and professional education to adult newcomers (Guo, 2015). However, as communities build social capital, they are able to push against the normative legislative framework of society-building and national identity that multiculturalism and multicultural education demarcate, toward greater flexibility, cooperation, and openness between ethnic groups in local communities (Guo & Maitra, 2020; Jurkova & Guo, 2022). This pushing back has increased opportunities for the delivery of place-based education to support migrants within a transcultural framework. Sobel (2004, p. 7) explains that place-based education is "the process of using the local community and environment as a starting point to teach concepts." Localized education thus uses the community as "text" to develop the competencies required to live and thrive in a diverse globalized society such as Canada and in local communities that immigrants and their collectivities inhabit.

This article presents findings of a grounded theory study that utilized in-depth interviews of 15 Latin American older adults (55 years and older) who participate in Unity in Diversity: Ageing at Home—a community-based mobile adult day programme in northwest Toronto. The programme draws on place-based education strategies to develop or strengthen the livelihood strategies of ageing migrants. This study is the first to explore the utilization of place-based education among community-dwelling ageing Latin American immigrants in Canada. The study's central question was: What are the experiences of ageing Latin American immigrants who participate in place-based learning activities in Toronto? Drawing on the insights of education scholars such as Langran and DeWitt (2020) and Freire (2011), as well as those of sociologist Teelucksingh (2006), which focuses on visible minorities within racialized urban spaces in Toronto, the article advances a life course justice perspective to explore the merits, limitations and contradictions evident in the delivery and use of place-based educational supports for racialized immigrants. In so doing, it advocates for the incorporation of a critical pedagogy of place framework into community education in order to develop or strengthen learners' and educators' capacity for critical thinking, social action and transformation.

### *1.1. Place-Based Education and Ageing Immigrants*

While transnational migration is pervasive and creates the need for older adults to learn and adapt to new

circumstances, the literature examining the nexus of ageing, transnational migration, and lifelong learning is emergent (Hepburn & Coloma, 2020; Zhu & Zhang, 2019). Immigrants' learning is often framed within resettlement programmes delivered by ethnocultural community-based organizations that provide housing, employment, and second-language education. As immigrants age, these services become less available and are replaced by services that focus primarily on recreation, health system navigation, skills training such as basic computer skill development, and psychogeriatric educational programming support within the context of healthcare.

The Unity in Diversity: Ageing at Home mobile adult day support programme was launched in 2009 and provides services to more than 300 participants from 10 ethnocultural communities in northwest Toronto (Jane and Finch Community and Family Centre, 2017). The programme is positioned within a continuum of support services for older adult immigrants and refugees and seeks to foster later-life learning and individual and collective resilience among community-dwelling older adults (Hepburn, 2020).

The adult day support programme provides informal education to service users with diverse educational backgrounds and learning capacities. Many service users often have low literacy levels in their native or home language and English and French, Canada's official languages. Therefore, informal learning strategies can combine place-based learning to convey health information, teach new skills, or develop existing ones. Gruenewald and Smith (2008, p. xvi) explain that "place-based education can be understood as a community-based effort to reconnect the process of education, enculturation, and human development to the well-being of community life." This explanation builds on Sobel's (2004, p. 7) work that outlines a foundational understanding of place-based education which emphasizes "hands-on, real-world learning experiences." As Sobel (2004, p. 7) notes:

This approach to education...helps students develop stronger ties to their community, enhances students' appreciation for the natural world, and creates a heightened commitment to serving as active, contributing citizens. Community vitality and environmental quality are improved through the active engagement of local citizens, community organizations, and environmental resources.

In considering the goals of place-based education, Casto (2016, p. 143) notes that it aims to ground "the educational experience in a local geography, including the history, politics, culture, and practices of a physical space." Therefore, it binds "[learners] to their place, including their social, cultural, and geographic community, through educational practice" (p. 143). Arguably, place-based education can assist in the development of community-level social capital and the strengthening of collective resilience among community-dwelling ageing

immigrants who participate in lifelong and place-based learning. Given that place-based education appears to be delivered in largely piecemeal and informal contexts, its strategies, modes of instruction, evaluation, efficacy and contradictions require in-depth research which is absent in scholarship focused on community-based ageing migrant populations in Canada.

### 1.2. Latin American Canadians

Canada's Department of Citizenship and Immigration identifies individuals from South and Central America as Latin Americans. There are approximately 447,325 Latin Americans in Canada, with the majority numbering 195,950 and living primarily in the province of Ontario (Statistics Canada, 2016). The region's top five immigrant source countries include Mexico (80,585), Colombia (70,035), El Salvador (48,075), Peru (29,620), and Brazil (29,315). Ontario's capital, Toronto, is among the province's top three cities with Latin American populations higher than the national average. Its Latin American population is 2.9% higher than the national average. The other two cities are Bradford (3.4%) and Leamington (3%; Statistics Canada, 2016).

The majority of Latin American Canadians (238,930) are between the ages of 25 to 54. However, significant portions of the population are ageing. Approximately 21,285 Latin Americans aged 55 to 64 years live in Ontario. Approximately 14,630 individuals in the same demographic live in Toronto. In the age range of 65 and over, 15,760 individuals live in Ontario. Correspondingly, 11,445 individuals in this cohort live in Toronto (Statistics Canada, 2016).

There is limited research on Latin Americans' social and economic integration, specifically their settlement outcomes and labour force participation in Canada. However, Hernandez (2021) explains that those participating in the labour market earn incomes that lag behind the Canadian total mean income of \$68,100. The population's settlement patterns highlight a preference for urban centres with a majority working in service industries, light manufacturing and health care. The age group 15 to 24 shows steady increases in enrolment in educational programmes. However, there are no statistics on enrolment among later-life learners in educational programmes.

### 1.3. Latin American Canadians in Urban, Racialized Communities

The Latin American Canadians that are the focus of the study presented in this article live in the Jane-Finch community, which is located in Toronto's northwest quadrant. Seventy percent of the neighbourhood's residents are visible minorities and 61% are immigrants. The vast majority of residents live in low income—31% below the national average (Statistics Canada, 2016). The area's residents are served by numerous community-based agen-

cies that focus on enhancing community involvement, integration, and well-being. Latin American Canadians live alongside numerous other racialized immigrant populations in the community but have been under-researched in comparison to other populations such as African/Caribbean and Asian immigrants. At first glance, their seeming unproblematic integration and acceptance by local populations have led researchers to suggest that they are almost invisible (Armony, 2014). While they number only 8.2% of visible minorities in Jane-Finch, an exploration of Latin American Canadians' experience of settlement and integration is critical for understanding their settlement experiences in such racialized high-density, low-income communities as Jane-Finch (Statistics Canada, 2016).

Teelucksingh (2006, p. 1) observes that, in Canada, growing numbers of racial and ethnic minorities are being drawn into urban centres and notes that "this demographic fact enables various levels of government to point, reassuringly, to objective evidence of racial diversity and the dominant ideology of multiculturalism." Teelucksingh regards the trend as alarming and contends that a high concentration of racialized groups in urban centres is not evidence of racial diversity or harmony. It is instead evidence of "commodified versions of multiculturalism in the form of 'ethnic culture,' 'ethnic neighbourhoods,' and 'ethnic restaurants' that can be tolerated and/or consumed as cultural products within the global economy" (Teelucksingh, 2006, p. 1). The result, according to Teelucksingh, is that immigrants such as racialized Latin American Canadians are "relegated to the status of otherness" in urban centres (such as Jane-Finch) upon which race is spatially mapped. In these places, race operates as an organizing principle that structures ideas of desirability and undesirability of its residents, often relegating them to low-income occupations and limited opportunities to compete in the knowledge-based economy. Teelucksingh explains that the Jane-Finch community is a key example of the spatial extension of racial domination and resistance. The community "draws attention to the material and symbolic construction of racialized, undesirable bodies via the spatial workings of racialized power" (Teelucksingh, 2006, p. 2).

While Latin American Canadians are not a fixed racialized group and many have over time been able to move in and out of racialization, class discourses often accompany processes of racialization which result in their differential access to resources such as quality and sustained second language education and training within urban centres (Armony, 2014; Teelucksingh, 2006). Localized education typically seeks to address issues of access and differential incorporation into society. However, drawing on Teelucksingh's insights on urban racialized spaces, Jane-Finch can be positioned as a conceptual and methodological tool for understanding the patterns of social organization that are being reproduced through community education in such places. Jane-Finch is a racialized space that is inscribed in Latin

American Canadians' everyday experiences. Therefore, place-based education within this locale requires critical analysis of how it is experienced and utilized by learners in the community.

#### *1.4. Conceptual Framework: Immigrants' Later-Life Learning, Life Course Justice, and a Critical Pedagogy of Place*

Shibao Guo and Srabani Maitra are among the few Canadian scholars to have addressed the education, migration, and ageing nexus. They contend that in Canada, later-life learning is often underpinned by "colonial forms of knowledge formation and racial modalities" (Guo & Maitra, 2020, p. 6). They note that these modalities require examination, "particularly in the context of transnational migrants living and working in western countries" (p. 6). A critical exploration of this nexus can bring to the surface the extent to which racial modalities in ageing immigrants' learning entrench everyday bordering systems that devise and utilize processes and practices for sorting and excluding migrants (Morrice, 2019). For example, within the settlement process, limited and truncated literacy and language education are often positioned to manage and facilitate the liminal integration of racialized immigrants and refugees in Canada. Further, Guo and Maitra (2020) contend that there is a racialization and stratification of knowledge within the curricular and pedagogical approaches that frame later-life learning in Canada. Practices of later-life learning often project immigrants as lacking in skills, knowledge, and identity markers and also modulate them as immigrant-worker subjects. While race relations and racial modalities are not an explicit goal of multicultural education and policies, Johnson and Joshee (2007, p. 142) argue that they are by nature and scope "implicated through the goal of promoting better intergroup relations" in Canada.

James (1995, p. 35) argues that "insofar as these policies set out how governments will respond to and accommodate the diverse population, then they provide a framework which will inform [educational] practices." As a sociocultural phenomenon, later-life learning is circumscribed by unequal power distribution. Hepburn and Coloma (2020) explain that formal and informal education is critical for racialized and diasporic immigrant older adults as they move toward the distal end of the migratory life course. They explain: "As they age, life transitions may require that they acquire or lose social roles and identities and thus through lifelong learning, they mobilise new skills in order to adapt to new circumstances and to varying degrees" (Hepburn & Coloma, 2020, p. 51). Yet, despite its importance to this population, later-life learning "has not attracted the empirical attention it deserves, given that knowledge and skill acquisition throughout the life course have been found to promote well-being, resilience, interest in technology, health management, and social participation, including the maintenance of social ties" (p. 49).

As ageing immigrants, Latin American Canadians' ability to utilize the learning process to improve their position in social, cultural, and economic structures is incumbent on their ability to navigate power systems and restrictive educational practices and policies. This ability can be supported by a life course justice approach to later-life learning that promotes a decolonization of learning policies and practices so that there is a fulsome understanding of what knowledge, skills, and ways of learning immigrant older adults find meaningful, necessary, or beneficial as they advance through their life course stages (Hepburn & Coloma, 2020).

The process of decolonizing later-life learning can be framed within a humanistic and more progressive view of education and the life course of ageing, racialized immigrants. Such a view interrogates the multicultural ethos that stratifies identities and knowledges and creates a more inclusive framework for lifelong learning. Guo and Maitra (2020, p. 14) contend that decolonization "would lead to the need for planning and designing lifelong learning curricula as well as institutionalized pedagogy based on non-western knowledge systems and epistemic diversity." Drawing on the work of Smith (1999), decolonization as a sociopolitical process can support a reimagining of marginalized identities, cultural knowledges, and practices. Such a process would frame later-life learning within the contexts of the importance of transcultural and immigrant communities that "hold within them deeper resources and ways of being" and support the emergence of a critical episteme that is framed by their embodied, quotidian experiences of learning and living within their communities (Hepburn & Coloma, 2020; Patel, 2016, p. 16). This humanistic approach aligns with the insights of Freire (2011, p. 74) who argues that the goal of education should not be the "integration" of "marginals," nor decolonization per se but rather, the goal of education should be to foster critical awareness and transformation.

The integration of a critical pedagogy of place in the delivery of localized education to Latin American Canadians and other ageing community-dwelling immigrants is generative for this process of fostering critical awareness and transformation. It is within the context of receiving localized education that immigrants, as learners, can be supported to identify "the distinguishing features of the ground beneath [their] feet" (Templeman, 2012, as cited in Reid, 2019). According to Gruenewald (2003b, p. 9), place-based education aims to (a) identify, recover, and create material spaces and places that teach us how to live well in our total environments (rehabilitation) and to (b) identify and change ways of thinking that injure and exploit other people and places (decolonization).

A sense of place refers to "the meanings of an attachment to a place held by a person or group" (Semken, 2005, p. 149). These meanings are non-exhaustive and can take many forms:

Including, but not limited to, aesthetic, economic, recreational, or spiritual value; familial or kincentric

rootedness; and cultural, historical, political, or scientific significance—can be associated with the same place, as different individuals and communities will experience it and know it in different ways. (Semken et al., 2017, p. 544)

If all of our life experiences are circumscribed by the power of place, then it is prudent that ageing racialized community-dwelling immigrants should have access to education that integrates critical and transcultural understandings of the ways in their spatial narratives, communities, and learning experiences are defined by social, political, or economic power structures (de Blij, 2008; Langran & DeWitt, 2020).

## 2. Methodology

This article utilizes data from a qualitative study that engaged 15 Latin American female older adults (aged 55 years and older) who are weekly participants in the Unity in Diversity mobile adult day support programme at the Jane and Finch Community and Family Centre in Toronto. The participants are originally from Colombia, Ecuador, El Salvador, Guatemala, and Venezuela and, while some have lived in Canada for as long as 40 years, others migrated to Canada in just the last decade. As part of a larger group of participants from varying ethnic groups, they attended a series of summer workshops focused on communication technology skills and later received virtual education and social service support during the COVID-19 pandemic. The research protocol was approved by York University's Office of Research Ethics and was conducted between July 2019 and December 2020. The study utilized constructivist grounded theory to provide a rich and layered account of participants' experiences of place-based learning within their community setting. Grounded theory encompasses "a systematic, inductive and comparative approach for conducting inquiry for the purpose of constructing theory" and requires the researcher to constantly interact with the data such as narratives while also being open to emerging analyses (Hepburn, 2020, p. 439).

## 3. Data Collection and Analysis

Purposive sampling was used to recruit potential participants. The strategy was designed to engage with a diverse range of participants who could provide multiple perspectives or variations of meaning ascribed to place-based learning. While multiple perspectives emerged, the study's aim was not to seek to "generalize information but to elucidate the particular, the specific" (Creswell, 2007, p. 126). I engaged participants in individual interviews that were up to 90 minutes in length. Interview data was then transcribed and anonymized. Interviews followed a format of intensity interviewing, which is a "gently-guided, one-sided conversation that explores research participants' perspec-

tives on their personal experience with the research topic" (Charmaz, 2014, p. 56). Following this technique, I relied on open-ended questions and followed up on unanticipated and emergent areas of inquiry, intimations, and couched views. In grounded theory, interviews create and open interactional space that is emergent, yet direct (Charmaz, 2014). Five participants were selected from the larger group for theoretical sampling and intensity sampling. Charmaz (2014) recommends using theoretical sampling, which involves selecting a smaller representative sample from participants whose feedback can generate theory building. This recommendation is linked to the strategy of intensity sampling in which information-rich cases illustrate the phenomenon intensely, though not extremely (Patton, 2015, p. 279).

I used memos to record the study's analytic phases and to construct theoretical categories, as well as document methodological dilemmas, directions, and decisions. Memos were helpful in guiding my process of defining codes and categories, making comparisons between codes and categories, entering raw data such as empirical evidence to support category definitions and the identification of gaps and patterns in the analysis (Hepburn, 2020). Writing memos is an essential aspect of data collection and analysis that results in a grounded theory because it is the methodological link and distillation process that aids in the transformation of data into theory (Lempert, 2007). I utilized two coding strategies: initial coding, which attempts to identify actions in each segment; and focused coding, which sharpens and condenses initial codes into conceptual categories and advances theory-building. The project was supported by grounded theory's iterative process of moving back and forth between empirical data and emerging analyses (Charmaz, 2014). Both data collection and analysis proceeded simultaneously, each guiding the other.

## 4. Findings

Fifteen Latin American Canadians residing in Toronto participated in the study. An analysis of their narratives revealed descriptions of their experiences of place-based learning in a mobile adult day support programme and its role in supporting their integration in Canada. Two major categories of interrelated concepts about how they experience place-based education emerged: (a) place-based learning for system navigation and well-being and (b) place-based learning for ongoing integration.

### 4.1. Place-Based Learning for System Navigation and Well-Being

As participants age, they have increasingly relied on localized support to ensure that they can delay going into long-term care or retirement homes and maintain their independence within their communities. Many participants indicated that learning in the community has been beneficial to their efforts at self-directed care and

navigating the local health and social service system. One participant who was born in Ecuador in 1941 and who migrated to Canada in 1972 explained that she finds learning activities useful for health and social service system navigation. She stated:

I have been coming to this programme for many years and I use it to learn about taxes and what health services are available for people my age. I know what services to get and where. Sometimes it means I have to get help outside of the community, like at a bigger agency, but I know where to go.

A Guatemalan participant who was born in 1929 and arrived in Canada in 1994 reported that learning in a cooperative setting and with other community members keeps her mind active and engaged. The programme also mitigates the risk of isolation that often plagues unattached older adults in the community. She said:

I am with people I know. I learn a lot in the group and I keep my mind busy and this is good as I get older. I don't have any children so this group is like my family. They check on me if I don't come to the group.

In contemplating their perceptions and experiences of the process of learning new skills and gaining knowledge in a localized setting, some participants reported that their day programme learning activities focus on topics that are of practical importance. The topics include online safety, financial literacy, and healthy eating and meal preparation. Another participant who was born in Guatemala in 1950 and who came to Canada in 2001 spoke of the importance of learning activities for her and other service users. She stated:

We learn how to take care of our health and how to be safe in the community. We are getting older, so we need to pay attention to our food and how we treat our bodies. We learn about those things at the group every week.

This participant reported that programme staff are able to give instructions in both English and Spanish to support the learning process. She explained:

Some of the people who work with us are from our culture, and if we don't understand something, they can use Spanish and English.

A participant who was born in Colombia in 1951 and who moved to Canada in 2017 explained that local later-life learning was initially a challenge and she has had to adapt quickly. She stated:

I like inside and outside learning. I'm even learning a new language and about different cultures. I taught when I was in Colombia, so when I learn something,

I help other seniors, depending on what we are learning about.

While all participants spoke positively of how beneficial later-life learning activities are, some stated that their current learning is a continuation of their education after many decades away from formal learning. One participant who was born in 1941 in El Salvador and arrived in Canada in 1987 stated:

I did a technical degree in El Salvador. In Canada, I did ESL and a daycare assisting course for six months. My learning restarted as an old lady but I am happy it did. I wish I had a better chance to go to school in Canada, but these workshops are still helpful.

Another participant who was born in 1936 in Ecuador and arrived in Canada in 1974 shared similar sentiments about a truncated education since migrating:

I went to primary school in Ecuador. I did ESL and I was lucky to have a Cuban instructor. I stopped because I worked too much in the factory to go to school. I had to raise my three children. Now is the closest I have come to going back to school and doing something for myself. It's now that I have more time to focus on school.

Several participants stressed the need for meaningful and well-structured educational supports that are responsive to their needs as they age. Another participant who was born in Ecuador in 1949 and arrived in Canada in 1991 stated:

I go to five different community services but I prefer the ones that have us work on topics or have information sessions where we [are] learning something outside of arts and crafts. We need more than arts and crafts to know how to stay out of hospital.

Many participants, having been involved in place-based learning for several years, appear to be more discerning about which activities are beneficial and which ones are not. They compare programmes throughout the community and select those that are enjoyable and provide practical support, knowledge, and skills that can improve their well-being and independence. While participants in the study utilize place-based learning activities to gain new skills and knowledge, they also benefit from the social interaction among peers that aid in building and sustaining a sense of community.

#### *4.2. Place-Based Learning for Ongoing Integration*

Latin American Canadians in the study reported that their knowledge of the community, its resources, and its residents has improved since participating in adult day programming and localized learning activities.

Place-based learning activities also draw service users from a wide array of ethnocultural groups and many of the study's participants reported using weekly sessions and related recreational events as an opportunity to learn from or with different cultures.

One participant who was born in Venezuela in 1950 and arrived in Canada in 1993 explained that, since engaging in later-life learning activities, she has realized how much she has in common with learners from other cultures. She said:

When I started to come here I was so afraid to try new things or to let people know that I didn't know something. But then I realized that other people from different cultures were just like me, learning new things, and after a while I got more comfortable because I was learning in a group.

Communication technology, which has been integrated into place-based learning activities, boosts cross-cultural interactions among participants who routinely communicate on various social media platforms. A participant who was born in Guatemala in 1960 and moved to Canada in 1991 explained:

My English is not so good but [to survive] in Canada you have to learn new skills. It became a necessity. I think I am more Canadian now than before because I can understand more what people are saying and what is happening around me.

In stressing the importance of continuous learning and the importance of understanding how to use technology to maintain a transnational lifestyle, she continued:

I want to keep learning more to improve my knowledge, learn about my community and the world around me. This country and the world rely on technology and it changes all the time. That means I have to keep learning. Social media helps me to fit in here but I still get to know what is happening in Guatemala.

One participant who was born in El Salvador in 1953 and arrived in Canada in 1980 hinted at an awareness of positional differences in her reflection on place-based learning, her current life course stage, and her integration in Canada. She stated:

I went as far as secondary school in El Salvador. When I came to Canada I did ESL classes and I got a job as a machine operator. If I learned anything else it was through here at the centre. I think seniors like me need a little more education because we have missed out on a lot. It was good to get back to learning again but there is still so much to learn about *el sistema* [the system]. I feel I am starting to learn from the wrong end of my life in Canada.

Several other participants critically accounted for the social context of their earlier learning experience and current place-based learning in Canada. They questioned why they were not given greater access to learning opportunities or resources that could prepare them to get more stable employment earlier in their settlement process.

## 5. Discussion

Themes emerging from Latin American Canadians' narratives in this study have indicated the varied ways in which they utilize place-based learning to construct sustainable lifeways. Also, they have reported that their later-life learning activities are focused on the acquisition of new skills and knowledge as they age. While these narratives highlight the benefits of receiving localized education, they are also indicative of Latin American Canadians' awareness of the inadequacy of the education they have received since migrating to Canada. These contradictions point to the need for a close and critical exploration of the spatial contexts in which they live and learn. In racialized immigrant communities such as Jane-Finch, Latin American Canadians can access cost-effective and informal place-based education that is integrated in the weekly day programmes they attend. However, observations of sessions and strategies used to teach Latin American Canadians and other ageing immigrant cohorts typically reflected the banking model of education of which Freire (2011) was highly critical. In this model, the instructor imparts or narrates information to students with hardly any consideration for the development of critical reflection or social action.

Following Teelucksingh's (2006) observations of the Jane-Finch community as a dense urban space in which race is inscribed into the everyday life experience of its residents, it is prudent to examine the ways in which community-based social service agencies deliver localized education there. This is important given that most agencies that support immigrant populations have settlement and integration as their primary goals. Their programmes are framed primarily within the context of multiculturalism, the Canadian government's official approach to acculturation. These policies seek to promote racial harmony and manage the integration of racial groups but also discriminate against them (Henry et al., 2000).

An exploration of place-based learning among racialized migrants "draws together the dynamic interaction of processes of racialization and of space. Racialized spaces are fundamental to how individuals, the state and institutional practices make sense of and manage 'race'" (Teelucksingh, 2006, p. 9). It is thus reasonable to consider what a critical pedagogy of place model could look like in practice with ageing immigrant populations such as Latin American Canadians living in racialized spaces such as Jane-Finch. Freire (2011) has provided some foundational concepts that can frame a critical approach to community-based education. These concepts have

also influenced the work of Langran and DeWitt (2020) and that of Gruenewald and Smith (2008) whose insights have contributed to the development of a critical pedagogy of place as a multi-disciplinary practice. These concepts include: (a) reading the world, (b) situationality, (c) place-conscious education, (d) stories, and (e) critical consciousness of race.

Freire explains that reading the world refers to a process by which learners make sense of their surroundings through lived experience. The process occurs before they enter the classroom and is closely connected to their cultural identity and their sense of place in the world or their social class. Community educators should seek to integrate Latin American Canadians' lived experiences (for example, pre- and post-migration experiences, cultural practices, language, etc.) into their instructional activities in order to create an optimal learning environment (Langran & DeWitt, 2020). The foregrounding of Latin American Canadians' cultural identity in the classroom is fundamental to supporting their practices of representation and visibility (Hall, 1990). In fostering a culturally responsive place-based learning, Freire and Campos (1990, p. 5) contend that:

[Educators should value and engage with the] differing levels of knowledge that [learners] bring with them....This intellectual baggage is an expression of what might be called their cultural identity...[which has been] fashioned within the setting of [their] home, locality, town and is strongly influenced by social origins.

Hall (1990) contends that the valuing of cultural identity and local epistemologies is necessary in post-colonial societies. The integration of cultural practices in critical place-based education activities can humanize and rehabilitate communities, functioning as a counterweight to colonial processes that dehumanize racialized groups and devalue their knowledge.

Closely connected to learners' lived experience, the concept of situationality refers to how learners' social location in respect to other members within their community shapes what they do or what they believe is possible (Langran & DeWitt, 2020). Gruenewald (2003a, p. 627) explains that place-based educators should take learners' social location into account given "that places are what people make them—that people are place makers and places are the primary artifact of human culture." A critical pedagogy of place, therefore, demands that educators and learners acknowledge and explore the history of colonization in Canada. They ought to critically reflect on the role of migrant groups such as Latin American Canadians as part of the larger colonial project and on their presence in places that are unceded territories traditionally occupied and used by First Nations people and/or their ancestors.

Gruenewald (2003b) also contends that educators should promote a place-conscious education by critically

examining their assumptions about learning spaces and communities they use or occupy—for example, through *reinhabitation*, whereby learners and educators consider how to live well in their communities, and through *decolonizing learning*, whereby educators and learners consider the people and places that are injured and exploited. These tasks should lead to an expansion of Latin American Canadians' knowledge about the communities in which they live (Gruenewald, 2003b). This suggestion can be further elaborated through the use of problem-posing education strategies advocated by Freire (2011). He explains that "problem-posing education involves a constant unveiling of reality" and a continuous striving for the development of critical consciousness (Freire, 2011, p. 81).

In commenting on the value of stories, Hall (1990) explains that the narratives and hidden histories of racialized communities have played a critical role in the emergence of important social movements, for example feminist, anti-colonial, and anti-racist. He notes that narratives provide resources of identity, meaning and resistance. They foster the imaginative rediscovery of dehumanized, fragmented and pathological identities within the dominant regimes of the West. According to Langran and DeWitt (2020), educators should expose learners to multiple perspectives and stories that exist within communities. Moreover, a critical pedagogy of place recognizes that an understanding of a "multiplicity of perspectives, including our own, and how our own story telling can both give voice to and silence perspectives" is essential (Langran & DeWitt, 2020, p. 46). Critical place-based activities can encourage learners to share narratives about the community in which they live. According to Langran and DeWitt (2020), by sharing stories, learners have an opportunity to add to or revise their existing knowledge as they develop a deeper understanding of the place or the world around them and question why some narratives are missing.

Another important consideration is the application of a critical consciousness of race framework to place-based learning. Educators should provide space for an exploration of race, power structures and the stratification of knowledge and identities. Such a framework can support an examination of how "the social construction of race has reinforced dominant spatial narratives that often produce negative outcomes for students" (Langran & DeWitt, 2020, p. 47). Teelucksingh (2006) explains that racialized spaces are connected to systems of power, which mediate the social relations between racialized and dominant groups and institutions. These hegemonic social relations contribute to the uneven development of racialized communities. Critical place-based education can support Latin American Canadians' critical reflection on how social categories materially and symbolically structure their agency and difference. This is a challenging task because marginalization operates at the level of everyday experience and may not be obvious to educators and learners (Teelucksingh, 2006). Despite this

challenge to the development of learners' critical awareness, Freire (2011, p. 83) suggests that educators can support learners to "develop their power to perceive critically *the way they exist* in the world *with which* and *in which* they find themselves; they come to see the world not as a static reality; but as a reality in process, in transformation."

The integration of a critical pedagogy of place into community education is generative for community-based research and practice with ageing immigrant populations. The framework is multi-disciplinary and can stimulate the development of "new forms of representation" among racialized migrant communities (Hall, 1990, p. 224) by fostering problem-posing education which "bases itself on creativity and stimulates true reflection and action upon reality, thereby responding to the vocation of persons as beings who are authentic...when engaged in inquiry and creative transformation" (Freire, 2011, p. 84). A critical pedagogy of place can generate learning activities that account for historical and contemporary power structures as well as Latin American Canadians' spatial narratives, and create possibilities for their reflection on and engagement with later-life learning for social inclusion, critical inquiry, social action, and transformation.

## 6. Conclusion

Scholarship focused on ageing immigrants' later-life learning experiences in Canada is emergent. This article presents findings from the first qualitative study to explore ageing Latin American immigrants' place-based learning experiences in Toronto. Centring a critical pedagogy of place and a life course justice approach to community-based education, the article highlights the spatial narratives and embodied experiences of racialized immigrants who strive to simultaneously maintain their independence within their communities and deepen their integration into Canadian society. While there are merits to place-based education, ageing Latin American Canadians are increasingly aware of those aspects of localized education that are inadequate. Moreover, the informal place-based education activities in which these ageing immigrants participate are focused mainly on health and social service system navigation. Future research is required on place-based education for ageing immigrants with an emphasis on curriculum design and content, modes of delivery, learning outcomes, and accessibility. Place-based education in the context of the study is framed within multicultural ethos; notably, it is delivered primarily to racialized older adults. This fact raises questions about the quality and outcomes of community education, especially when it is delivered in communities with significant racialized immigrant populations and without a focus on critical inquiry. A life course justice approach and a critical pedagogy of place can assist researchers and community-based practitioners to be aware of these issues and of the social and

politically complex world that ageing immigrant learners occupy. The approaches constitute a generative conceptual and practice framework that presses for humanistic approaches to community education.

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## Conflict of Interests

The author declares no conflict of interests.

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Article

## Lifecourse Transitions: How ICTS Support Older Migrants' Adaptation to Transnational Lives

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### Abstract

Lifecourse transitions from adulthood into older age are particularly complex for transnational migrants, bringing additional challenges and opportunities. Adding to the growing literature on ageing and migration, this article illustrates the ways ICTs facilitate the transnational lifecourse transitions of Vietnamese migrant grandparents in Australia through lifecourse digital learning. Research findings highlight the crucial role that digital citizenship plays in supporting migrant grandparents' adaptation to increasingly mobile lives through practices of digital kinning and digital homing. These practices include using technological tools to maintain social support networks, exchange transnational caregiving, tackle language, navigation, and social integration barriers, and consume culturally relevant media, all of which support migrant identities and belongings. Findings confirm the importance of ICTs in promoting lifecourse digital learning for older migrants who are often stereotyped for their poor learning capacities and ability to adapt to new living arrangements because of their older age.

### Keywords

ageing; ICTs; lifecourse learning; lifecourse transition; migration; Vietnamese older migrants

### Issue

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### 1. Introduction

Transitioning from adulthood to old age is a process that often involves changes in social identities, from worker to retiree, from healthy and able-bodied to precarious states of wellness and increasing frailty, including restricted mobility that can further compound poor health conditions from relative independence to increasing dependence, from being a couple to being single, and from being socially active to reduced levels of social engagement, shrinking social networks. (Brink, 2017; Jennifer & Karen, 2004; Prendergast & Garattini, 2017; Tam, 2018). For older adults who are members of transnational families, there are additional complexi-

ties to negotiate. Transnational families comprise multi-generational members dispersed in households that span national borders. Older adults in transnational families might be left behind by migrant adult children (Ariadi et al., 2019; Falkingham et al., 2017; Zickgraf, 2017), follow adult children to a new country (King et al., 2014; Plaza, 2000; Zhou, 2019), or participate in ongoing movement between home and host countries to provide and/or receive care and support (Da, 2003; Horn, 2017; Tezcan, 2021). As a result, their ageing process often involves living in unfamiliar places, requiring significant effort, new skills, and knowledge to adapt. It also requires the development of a transnational habitus, the ability to balance local and transnational lives across

places that have different lifestyles, cultural beliefs, and practices (Tian, 2016; Wyss & Nedelcu, 2020).

Therefore, in addition to experiencing the age-related trajectory known in lifecourse theory as the “timing of lives” (major stages of life such as childhood, adolescence, adulthood, and old age; see Elder, 1994), transnational older adults undergo other lifecourse transitions that are influenced by changes in social and cultural context (Bengtson & Achenbaum, 1993), which are the focus of this article. These changes are complex and varied, often including limited opportunities to engage in free expression and conversations using their mother tongue, and restricted capacity in written and spoken communications using the host-country language (Lie, 2010; Shankar, 2003). They also undergo profound adjustments to their independence, as their homeland networks transition from proximate to virtual contact and care (Ho & Chiu, 2020; Wilding & Baldassar, 2018). Moving to a new country often results in a shift from their role as income generators to income dependants (Subramaniam, 2019), from paid workers to unpaid caregivers and care recipients (Hamilton, Kintominas, & Adamson, 2021), from being primary decision-makers to dependants (Subramaniam, 2019), and from a high-ranking social position to the position of newcomer migrant without social recognition or status (Treas, 2008).

One important resource in older migrants’ lifecourse transitions caused by these changes is the motivation to become skilled users of digital technologies (Baldassar, 2016). A range of technologies (e.g., tablets, the internet, laptops, computers, and smartphones) are actively sought out by migrant grandparents to support their adaptation to increasingly mobile lives. Compared to their non-migrant counterparts, older migrants are more motivated and active in learning how to use digital technologies (Baldassar et al., 2022). Recent research identifies two modes of engagement with digital technologies in transnational families and communities, which are referred to as practices of “digital kinning” (Baldassar & Wilding, 2020) and “digital homing” (Wilding et al., 2022). Digital kinning refers to the regular, routine, and ritual online interactions that are used by kin to sustain their sense of familyhood and “mutuality of being” across time and distance. For example, digital kinning might include frequent messaging on a smartphone that shares the details of daily life, such as meals and activities, including providing regular emotional support and practical advice. Digital homing, on the other hand, refers to online practices that are aimed at sustaining a sense of home and belonging that transcends here and there, past and present, for a migrant. Digital homing practices secure an ongoing connection to the homeland and associated cultural, ethnic, and national identities that extend beyond kinship networks. This might include organizing activities with diaspora community members and providing or receiving community support (Wilding et al., 2022) as well as accessing culturally significant resources like

online music and film content from the country of origin in the homeland language (Baldassar et al., 2020). Both digital kinning and digital homing rely on digital citizenship, which helps address challenges such as language barriers and difficulties accessing appropriate services by facilitating the navigation of spaces and places as well as aiding everyday activities overseas (Ho & Chiu, 2020). Hence, the processes of digital engagement are salient to older migrants’ lifecourse transitions (Prendergast & Garattini, 2017), whereby their lifecourse learning continues in different forms to facilitate their wellbeing, social integration, adjustment, and adaptation (Kim et al., 2011; Lam et al., 2010; Rawinski, 2017; Zhu & Zhang, 2019). Despite the nexus of ageing, ICTs, and migration, there is a paucity of research regarding the role of ICTs in the lifecourse transitions of older migrant adults.

To address the existing gap, this article explores how ICTs are used by Vietnamese migrant grandparents to support their lifecourse transitions. It begins with an overview of lifecourse theory and its relevance to ageing and migration, followed by a brief review of the literature on the importance of ICTs in ageing and migration. Next, it outlines the challenges faced in their transnational lives, then closely examines the ways Vietnamese grandparents, through lifecourse digital learning, apply digital technologies to navigate their overseas lives. Finally, the article discusses the relationships between digital technologies and lifecourse transitions in supporting Vietnamese migrant grandparents to preserve their social and cultural identities and enhance their social integration and adaptation, which are important cornerstones for social wellbeing in late-life migration.

## 2. Literature Review

### 2.1. Lifecourse Theory, Ageing, and Migration

The lifecourse perspective is a multidisciplinary paradigm that is broadly employed to research changes in people’s lives, taking account of structural, cultural, and social conditions (Mills, 2000). Giele and Elder (1998) introduced five fundamental themes of the lifecourse theory that highlight changes in one’s lifetime. These themes include life-span development (lifelong processes of ageing and human evolution), agency (human lives constructed through choices and actions comprising opportunities and constraints created by history and social context), time and place (historical times and places that individuals experience shaping their lifecourse), timing (developmental antecedents and consequences of individuals’ life transitions, incidents, and behavioural types across timing in their life), and linked lives (individuals’ interdependent relationships and socio-historical influences). The lifecourse paradigm has been extensively applied in different disciplines such as health, criminology, culture, and family studies (Brotman et al., 2020; Elder, 1994; Giele & Elder, 1998; Hareven & Adams, 1982; Moncur, 2017).

Lifecourse theory has also been applied in ageing and migration studies to interrogate the causes and effects of changes resulting from the economic, social, and cultural contexts of people's later lives. For instance, Ferrer et al. (2017) utilized an intersectional lifecourse perspective to examine the connections between structural inequalities and lived experiences of ageing among older migrants in Canada, highlighting the intersectional lifecourse perspective that can help nuance the connection of personal, relational, and structural process that various groups of older adults undergo in late life and across the lifecourse. Other research features the negative impact of transnational mobility on migrants' lifecourse transitions into older age, where different socio-economic, cultural, and institutional contexts and limited knowledge and skills for social integration and adaptation conspire to reduce older migrants' access to appropriate health and social care services (Koehn et al., 2013; Rao et al., 2006). Several other studies indicate that shifts in cultural values and beliefs (e.g., from collectivism to individualism) may cause intergenerational conflicts and adjustments in care practices and exchanges between older migrants and their family members (Hugo & Thomas, 2002).

Of particular relevance to this article is the modest number of studies that examine the role of lifecourse learning in facilitating older migrants' adaptation to their transnational lives. For example, Kim et al. (2011) indicate that older Asian immigrants benefit from participation in leisure educational programs, meaningful recreational activities, and multicultural events in the USA to cope with adaptation challenges associated with cultural differences. In another empirical study, Zhu and Zhang (2019) demonstrate that older Chinese migrants adapt to new lives and access successful ageing in Canada through lifecourse learning, including developing new language and computer skills, learning about culture and history, and engaging in civic, leisure, and health activities. Thus, while they are still a relative rarity, studies on migration and ageing should not ignore the role of lifecourse learning in supporting older migrants' lifecourse transitions, including the links between lifecourse learning, digital citizenship, and the opportunities afforded by the current multimedia environment.

## 2.2. Digital Citizenship, Digital Kinning, and Digital Homing

Digital citizenship is "the ability to understand and use information in multiple formats from a wide variety of sources when it is presented via computers connected to the internet" (Gilster, 1997, p. 6). Digital citizens have the "digital literacy" (Hagel, 2015) to effectively use digital technologies for various purposes, including searching, utilizing, and disseminating information in the digital world. Digital citizenship can be limited by a lack of motivation and self-efficacy (low interest), functional constraints (cognitive decline), structural limitations (unaf-

fordability), and interpersonal limitations (lack of support; Friemel, 2016; Schreurs et al., 2017). These constraints and limitations, along with socio-economic status, age, gender and education (Ono & Zavodny, 2007) can contribute to the digital divide, which is defined as "the gap between individuals, households, businesses, and geographic areas at different socio-economic levels with regard both to their opportunities to access information and communication technologies (ICTs) and to their use of the internet for a wide variety of activities" (OECD, 2011, p. 5).

Digital citizenship enables migrants to benefit from polymedia environments in which the "integrated structure" and "affordances" of ICTs create a growing environment of communicative opportunities for users coming from various social and cultural contexts (Madianou & Miller, 2012). It is in these spaces that transnational families engage in practices of digital kinning and digital homing. Digital kinning processes feature the development and maintenance of both kin and kin-like relations, which play an important part in assisting older migrants to overcome feelings of loneliness and isolation in the new living environment where they do not have pre-established social relations (Baldassar & Wilding, 2020). Digital homing, on the other hand, features processes that help older migrants sustain a sense of self that extends beyond the family, supporting their sense of connection to both homeland and host cultures and societies, which helps reduce feelings of isolation and enhances a sense of belonging (Wilding et al., 2022). Despite some distinctions in practices, both digital kinning and digital homing can contribute to protecting the social and cultural identities of migrants who are navigating transnational lives (Baldassar & Wilding, 2020; Wilding et al., 2022).

## 3. Methodology

### 3.1. Notes on Research Methodology

This article builds on data drawn from qualitative research conducted with 22 Vietnamese migrant grandparents (10 grandparent visitors and 12 grandparent migrants) in Perth, Melbourne, and Sydney, Australia, in the twelve months of 2020, during the start of the Covid-19 pandemic. In the original research design, physical fieldwork was planned; however, social distancing practices and border closures made physical field trips non-viable. To address this challenge, data collection was conducted mostly online, and comprised of fine-grained ethnographic interviews and online participant observation. Each participant chose to join one or several short online and/or offline interviews ranging in length from one to four hours, depending on their availability and preferences. The interviews employed broad, semi-structured and descriptive questions (Westby et al., 2003) that allowed grandparent participants to describe their everyday activities, life and migration histories, perceptions of ICTs, social support networks (SSNs),

reflections on ageing, and histories of technology use. Online participant observation was conducted with permission from grandparent participants after ethnographic interviews were carried out with them, and involved gathering information about how participants were engaging with social media. After becoming online friends with grandparents, the first author visited their Facebook profiles to follow their posts and record the ways they interacted with online and distant family members and friends (e.g., sending emojis and texts or remaining silent). Relevant online comments and posts were documented in electronic diary notes to observe grandparents' patterns, frequency and developments of social media use, including practices of digital kinning and digital homing. In addition, ethnographic field notes were collected including short descriptions of participants, their living environments, and their interactions with ICTs. The field notes and electronic diary notes were then coded and analysed to identify similarities and differences in grandparent participants' demographic backgrounds, living environments and interactions with ICTs and new media.

Data analysis was aided by NVivo software 12 to code transcribed ethnographic interviews and field notes to construct themes for analysis. All interview transcripts and field notes were carefully read and collated for each participant to select the case studies and excerpts relevant to the themes constructed. Data coding was carried out in the interviewing language (Vietnamese). Case studies and excerpts were translated into English and carefully double-checked. In particular, to depict how Vietnamese migrant grandparents use ICTs to facilitate transnational SSNs through digital kinning processes, an actor-centred interactive network-mapping tool called Vennmaker was used. The maps provide a useful illustration of various dimensions of digital homing and digital kinning that emerged through the data analysis, including type of SSNs (proximate, distant, virtual), frequency of contact (daily, weekly, monthly, on occasion, yearly and never), type of kin and non-kin relations (spouse, children, grandchildren, siblings, relatives, friends, colleagues, neighbours, support workers, medical professionals, organizations), type of communicative forms (audio calls, video calls, emails, group chat, i-messages, home visits, no contact), and degree of importance of kin and non-kin relations (positive, neutral, negative).

To ensure the anonymity and confidentiality of research participants, pseudonyms are used following the conditions of ethics approval.

### 3.2. Research Participants

The sample comprises 12 women and 10 men, aged 54 to 91. The grandparent visitor cohort is younger with an average age of 62.2 years, while the grandparent migrant cohort is older with an average age of 72.8 years. According to the lifecourse stage (lifespan development) defined by Elder (1994), all grandparent participants had

reached old age because they had all become grandparents. In addition, Vietnamese legislation defines "elderly" as 60+ years (Vietnamese National Assembly, 2009). However, according to Australian Government definitions, old age begins at 65 years (Australian Bureau of Statistics, 2016), although there is an acknowledgement that for some culturally and linguistically diverse groups, old age may begin a decade earlier.

If we define the lifecourse as "a sequence of socially defined events and roles that the individual enacts over time" (Giele & Elder, 1998, p. 22), then almost all grandparent participants stated that their roles had changed as a result of becoming grandparents, but also because of transnational mobility. These changes included moving from only being parents to also being grandparents, from being income generators to income dependants, from paid workers or retirees to unpaid caregivers and care recipients, and from masters of the home to "guests" of their migrant descendants. In particular, they all assumed a primary caring role for grandchildren, helped maintain their adult children's homes, and relied on adult children to pay for migration-related costs (e.g., return air tickets, health insurance, visa, accommodation, and food). Some of them resigned from paid work or terminated their own businesses temporarily or permanently in the homeland (Nguyen et al., in press). In addition, most grandparent participants confided that migration had been a major life event for them, whereby they experienced severe displacement, shifts in social and cultural norms, different practices in service provision, and challenges to their independence because of difficulties in navigating places and spaces, as well as the inability to drive.

Regarding educational background, 14 grandparents had completed general (primary or secondary) education while eight had obtained a university degree or higher. Distinctively, three grandparents possess a doctorate, and one of them held the associate professor title before retirement. Regarding socio-economic background, most grandparents ranked themselves in the middling (low-middle) class, defined as "often, but not always, well educated. They may come from wealthy families, but more often than not they appear to be simply middle class" (Conradson & Latham, 2005, p. 229). These socioeconomic and educational features are important factors influencing migrant grandparents' engagement with ICTs for lifecourse digital learning, which are further analysed below.

Regarding access to digital devices, all grandparents stated that they possessed at least one digital device (smartphone, tablet, smart TV, laptop, or desktop) that was connected to the internet for 24 hours over seven days per week. Adult children mainly supplied these devices and paid for monthly internet connection; however, some grandparents had purchased their smartphones themselves before migration. All grandparents revealed that they had some basic digital skills and knowledge (e.g., receiving and making audio and video

calls, opening webpages to search for desirable online information or watching favourite programs, engaging in online platforms such as Facebook, Zalo, and Viber to stay in touch with kin and friends through online interactions or group chats, playing games, and learning new cooking, gardening, and exercise skills). Over half of the grandparent participants started using ICTs only *after* their first migration. Some have become proficient ICT users while a few others are not keen to engage because they lack motivation, self-efficacy, and/or have functional constraints. Despite this, all grandparents reported no significant emotional or instrumental barriers in accessing and using ICTs. In other words, an insignificant digital divide was identified in this research sample. This can be explained by the evidence that migrant grandparents receive greater digital support from transnational family members and have greater motivations to stay in touch with distant kin and non-kin ties with the assistance of ICTs (Baldassar et al., 2022).

#### 4. Research Findings

##### 4.1. Changes and Constraints Faced in Transnational Lives

Similar to transnational grandparents in other studies (e.g., Da, 2003; Hamilton, Hill, & Kintominas, 2021; Ho & Chiu, 2020; King et al., 2014; Plaza, 2000; Treas, 2008), Vietnamese migrant grandparents face a wide range of challenges during their settlement processes and sojourns in Australia. The predominant challenge is the language barrier. Of the 22 participants, only one grandparent stated that he faced no language barrier as he could speak English fluently. This grandparent had travelled and worked internationally before retirement in Vietnam. Two others stated that they had “enough English” for everyday conversations but no confidence in addressing complicated issues such as meeting with medical professionals or bank staff. The other 19 grandparents either knew some basic English or could only say a greeting such as “hello/goodbye” or “good morning/afternoon,” taught by their grandchildren or adult children. Grandparents also face difficulties in autonomous local travel. Of the 22 grandparents, only four male grandparents could drive and only six grandparents (mainly women) could use public transport. The others relied on their adult children for local transport. Some grandparents reported limited digital skills and knowledge about how to use ICTs for various purposes and relied on support from adult children or friends. However, they all recognized the importance of ICTs in their transnational lives. Anh, a grandparent visitor, revealed:

I find ICTs very convenient and affordable. I am living in two distant hemispheres but I can talk to my kin and friends in Vietnam without paying any costs....To be honest, the internet and smartphone are like...uhm...the meals I must eat and the clothes

I have to wear every day. If I don't use it in a day, I feel like....I lost connections and contacts to the world.

In addition, Vietnamese grandparents disclosed that they experienced shifts in social and cultural norms and practices, from familism and collectivism (which are central to Vietnamese people's lives) to individualism (which is endorsed by most Australians and their migrant descendants). Other constraints, such as visa and migration restrictions applied by the Australian Government to limit overseas grandparents' permanent or long-term stays, border lockdowns because of the Covid-19 pandemic, care burdens either in the home or host country, loss of social connections, isolation, boredom and depression, and difficulties in accessing local social and aged care services, were also reported (Nguyen et al., in press).

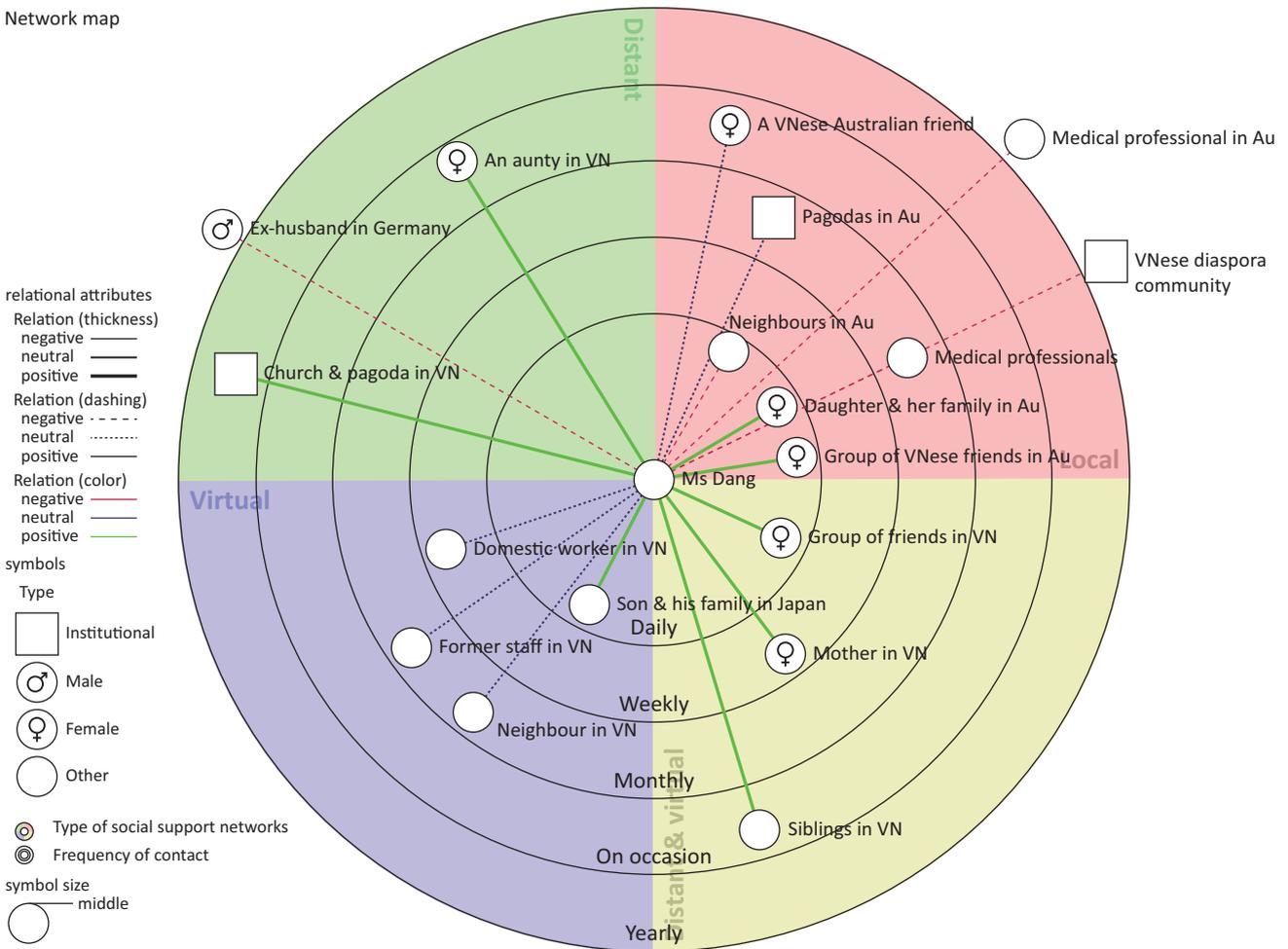
##### 4.2. Digital Kinning: Maintenance of Transnational Care and Social Support Networks

A growing body of literature demonstrates that the use of ICTs to maintain SSNs has become indispensable to transnational migrants. Thanks to the proliferation of digital affordances, migrants have increasingly engaged in digital learning to practise transnational care as well as to sustain transnational SSNs (Baldassar, 2016; Baldassar & Wilding, 2020; Nguyen et al., in press). The following network maps, developed with Vennmaker, help to illustrate the digital kinning practices of Vietnamese migrant grandparents who use ICTs to facilitate SSNs and exchange transnational care and support.

Dang (55 years old) and Dat (69 years old) are good examples of older migrants who use ICTs to exchange transnational care and support with distant kin and non-kin. Dang moved to Australia to provide hands-on personal care for her two granddaughters (pink quarter in Figure 1). Dang's son and his family migrated to Japan in 2019 to work for an international company (purple quarter). In Vietnam, Dang has an over-80-year-old bedridden mother (yellow quarter) who is primarily cared for by a live-in domestic worker and her brother living nearby. In her SSNs, Dang also has three siblings, an aunty, some former colleagues and staff, and in particular, a group of 10 close high-school friends in Vietnam (purple, light green, and yellow quarters). Dang defined herself as a follower of Catholicism and Buddhism, who continues maintaining her local and transnational ritual support networks (pink and green quarters).

In order for Dang to fulfil her care obligations to her frail mother and two distant young grandchildren, with the assistance of her daughter, she learnt how to use a smartphone and social media (Zalo and Facebook). Dang maintained daily contact via video calls, group chats, and i-messages with her son and grandchildren, as well as a group of Vietnamese close friends, whom she regards as “biological sisters.” For her mother, she provided transnational care by sending remittances to pay the domestic

Network map



**Figure 1.** Illustration for digital kinning practices of a grandparent visitor.

worker, cover her mother’s daily expenses, and purchase nutritional supplements. In addition, she made audio or video calls three days per week to monitor her mother’s health condition and to support her mental wellbeing. She disclosed that she could not provide proximate care for her mother because she was unable to leave her care duties to her grandchildren in Australia. In particular, during the Covid-19 pandemic, Dang’s transnational caregiving became intensive and frequent because she could not fly back to her homeland to care for her mother in proximity or travel to Japan to provide proximate care for her two younger grandchildren. Instead, Dang practised exchanges of regular financial and emotional support to reduce her feelings of guilt and help her sick mother feel her filial piety. Moreover, daily video calls to her grandchildren in Japan gave Dang a feeling of intergenerational solidarity. She could observe her grandchildren’s growth while her grandchildren could practise Vietnamese, and feel their grandmother’s love and care for them. Dang’s social wellbeing was additionally supported by her daily digital engagement with her close friends in Vietnam. She confided that online group chats were very convenient for her to interact and share interesting news, social events, personal feelings, and cooking and garden-

ing tips. Hence, apart from giving her a feeling of being “there” despite being “here,” Dang revealed that digital technologies helped balance her transnational life by providing her with new knowledge and skills as well as maintaining her transnational caregiving and SSNs.

Like Dang, Dat, a grandparent migrant, is managing his transnational care and relationships through digital kinning practices. Dat and his wife followed their two sons to settle in Australia under the Family Reunion Program in 2014, after having paid numerous short-term visits to them since 2006. However, some years after the reunion, their elder son fell ill with a chronic disease and died. Their daughter-in-law and granddaughter then returned to Vietnam while their second son migrated to the USA to work for a corporation. Dat and his wife had no choice but to remain in Australia, despite their advanced age. Because Dat and his wife do not plan to relocate to the USA or return to Vietnam, and their second son does not intend to resettle in Australia, transnational care is the only way for them to maintain distant support.

Unlike Dang, Dat began using ICTs 30 years ago as a part of his work requirements. Dat is proficient at using ICTs to practise digital kinning with his distant kin and social ties; however, he revealed that he only established

his Facebook profile and learnt how to use social media after his migration. Dat and his wife exchange transnational care with his son in the USA (yellow quarter in Figure 2) through daily video calls. They reported feeling “very pleased” and “close” to their son despite geographical distance. In addition, Dat makes weekly video calls to his granddaughter, siblings, and relatives in Vietnam (yellow quarter). Dat contacts his non-kin ties monthly through audio and video calls, i-messages, emails, online chatting, comments and emojis shared on Facebook profiles (purple quarter). These digital kinning practices have made him feel less isolated and helped him stay connected with distant family members and friends. Dat reported that his friends in Vietnam and other countries follow him on Facebook and vice versa, he follows them by engaging in their online posts and group chats.

The cases of Dang and Dat illustrate that ICTs are important to older migrants in sustaining distant and virtual SSNs. The network maps indicate the density of virtual and distant SSNs (purple and yellow quarters in Figure 2) and their greater frequency of contacts compared with the sole distant or proximate SSNs. For Vietnamese people whose family and community rela-

tions are central in their lives (Thomas, 1999), continuity of distant kin and non-kin ties are important sources of emotional support during their sojourns or early settlement overseas. Digital citizenship can assist in addressing transnational caregiving (Baldassar & Merla, 2014) and preserve kin and social relationships, which play a crucial part in late lifecourse transitions. The cases of Dang and Dat show that long or short histories of digital engagement and proficiency do not impede older migrants’ continuity in gaining new digital skills and knowledge. The advancement of digital technologies with new functions, interfaces, and updates often requires all internet users, including older people, to continue lifecourse digital learning (Moncur, 2017; Prendergast & Garattini, 2017). Dat’s experience of learning to use Facebook despite his previous relatively high digital literacy is a good example of this continuous digital learning. In comparison, Dang’s digital learning occurs daily. She confided that whenever she forgets or does not understand something, she can ask her daughter or granddaughters to (re)teach her. Dang said that she was willing to learn new digital skills and knowledge not to be “left behind” in the digital world. She took pride in her fast learning and professional use of ICTs compared to other older

Network map



**Figure 2.** Illustration for digital kinning practices of a grandparent migrant.

migrants. Hence, with the assistance of family members or self-motivation, older migrants have engaged with ICTs frequently and effectively.

#### *4.3. Digital Homing: Development of Migrant Belongings and Preservation of Social and Cultural Identities*

Digital homing includes practices that help migrants feel a sense of belonging in the country of settlement and maintain their sense of connection with places and communities in the country of origin through ongoing consumption of homeland media (e.g., Baldassar et al., 2022; Wilding et al., 2022). This was also commonly evident amongst our research participants, as demonstrated by Tien (75 years old), a grandparent migrant who (together with his spouse) migrated to Perth to join their adult children in 2013. Tien used to be a factory worker who retired in 1989 and had not used ICTs until his migration. His adult children guided him to employ digital technologies to preserve his social and cultural identities by “watching the news on YouTube, reading news on electronic papers, listening to radio on the internet” through a smart TV. Reflecting existing accounts of digital homing, Tien confided that “consuming these media helped me feel more comfortable in Australia and more connected to my homeland.”

Like Tien, other grandparent migrants reported spending between one to five hours per day consuming homeland-related media, including national and private radio and television channels such as the Voice of Vietnam, VTV channels, VTC14, electronic newspapers (e.g., *Dan Tri*, *Cong An Nhan Dan*, *Thanh Nien*), and Vietnamese contents on online platforms and applications like Media Player, YouTube, Music Apps, and social media (Facebook, Zalo). Several well-educated grandparents disclosed that they watched the news aired in the Vietnamese language by Australia’s special broadcasting services, read print and online newspapers published by the Vietnamese diaspora community in Australia, and accessed the news shared on the Facebook profiles of Vietnamese international students and other diaspora members in the host country.

In addition to this established mode of digital homing, our research findings identify complementary modes of digital homing that have not previously been reported in detail. The first of these is the use of navigation tools to develop a sense of place in the host country. Vietnamese grandparents who migrate in late life often face barriers that limit their lives to within their houses or nearby areas (Nguyen et al., in press). However, with the assistance of ICTs, they can build a stronger and more independent sense of place (Convery et al., 2012). This supports the development of emotional attachments to the host country, which may reduce their longing to return to their homeland over time. The capacity to manage their overseas lives independently can also provide older migrants with a sense of satisfaction,

self-control, and independence, which plays an important role in their late lifecourse transitions by promoting their social wellbeing.

Anh and Thang are two grandparents who developed a clear sense of migrant belongings with the assistance of digital navigation technologies. Unlike Anh (a grandparent visitor providing two one-year visits between 2018 and 2020 to support her daughter, who did a master’s degree in Australia), Thang is a grandparent migrant who, together with his wife and younger daughter, moved to Australia in 2012 permanently. Anh possesses a bachelor’s degree and used to work for an insurance company before her retirement, while Thang completed secondary education and used to run a small business in Vietnam. Because her work required frequent online interactions with clients, Anh started using ICTs 20 years ago; meanwhile, Thang only commenced his digital learning since his migration.

Both Anh and Thang received some support from their adult children to learn how to use Google Maps and GPS to navigate places and spaces in Australia. Anh explained that her daughter helped her install the Victoria Public Transport Application on her smartphone and guided her on how to use it to plan her journeys for inner-city travel for shopping, sightseeing, and sporting activities. For walking, she uses Google Maps to navigate directions. If she has trouble finding a destination, she readily shows online maps to bus/tram drivers or passengers, using body language or online Google Translate to ask for assistance. Similarly, Thang’s daughter guided him to use Google Maps and GPS to drive to work every day and take his wife and grandchildren out for sightseeing. However, Thang revealed that he had never used public transport as he had not found it convenient and he could not speak English to seek help. Anh and Thang stated that digital navigation applications helped them feel more confident to manage their overseas lives independently.

Tham and Duong (87 years old) are two other grandparents who joined their adult children in Australia in the 1990s. They are living with their partners in private rental properties and are eligible for the government-sponsored Home Care Package—the scheme provides support to older adults having complicated care needs to live independently in their own homes. Tham’s mobility is restricted because she has had several surgeries on both legs and can only walk with aids for about 1.5 meters. Duong, meanwhile, can go out independently using his electronic scooter but he also has the primary caring role for his wife who is living with dementia. These grandparents are frail and need social support from carers or family members to join social activities, including shopping and attending community hubs. However, because of time limits on their formal care support, Tham and Duong cannot attend all desirable social activities, especially the daily and weekly prayer ceremonies hosted by local churches or pagodas.

In our second example of additional digital homing practices, Tham and Duong addressed their mobility

restrictions by choosing to attend online and recorded social events in Australia with the assistance of their friends (Duong) or family members (Tham). Duong often asks his Vietnamese Australian friends to Livestream or make video calls to him, so he and his wife can join praying ceremonies hosted by local churches from home. Similarly, Tham asked her daughter to open recorded files or video clips so she could attend prayer and social events organized by local pagodas. Thanks to ICTs, both Tham and Duong could join ritual practices and some social activities, which help reduce their isolation and loneliness in their late age.

Finally, language barriers continue to pose a big challenge for migrants, especially, older migrants (Kan et al., 2020; Pot et al., 2020). Empirical studies have indicated that language barriers are the biggest obstacle for older migrants to cope with in their transnational lives (Hamilton, Hill, & Kintominas, 2021; Ho & Chiu, 2020; Lie, 2010; Shih, 2012). However, recent studies reveal that digital technologies could help older migrants address this obstacle owing to the swift advancement of machine-assisted translation (MAT) tools, which offer digital users a range of options (Ho & Chiu, 2020). Our research findings contribute to this evidence as eight out of 22 grandparent participants know how to use at least one MAT tool to manage language barriers.

To illustrate this phenomenon, we use the cases of two grandparents, Hung and Dat. Hung (70 years old) is a retired teacher in Vietnam. Since 2005, together with his wife, they have undertaken five short-term visits (one year each) to stay with their youngest daughter's family in Sydney. Before his migration, Hung's nephew, who is working as an employee of a multinational company, helped install a MAT application on his smartphone and taught him to conduct audio, text, and visual translations. The tool supports Hung to tackle language barriers in his everyday activities. For instance, when shopping, if Hung wants to buy some nutritional supplements but he does not understand the prescriptions (e.g., ingredients, use, and side effects), he employs the scanning function of the application to interpret the prescriptions into the Vietnamese language. He revealed that this application was extremely convenient because it could translate several languages (not just English) into Vietnamese. Though the application cannot generate perfect translations, the translated contents are understandable. Hung explained:

Language is not a barrier when I am here. For complicated issues such as visiting doctors, my adult children or interpreters will help me. For general matters, I can use this machine-assisted translation tool to understand conversations or texts....How good technologies are today [laughs].

Like Hung, Dat can independently use the Google Translate App (GTA) to manage his overseas life. Dat used to live, study, and work in a non-English speaking country

for six years when he was young; as a result, he only has moderate English capacity. He can conduct simple conversations in English but for complicated medical or legal issues, he needs assistance. His writing is not good, so he often uses GTA to support his writing. At the time of his interview, Dat appealed to the police to request an investigation into an online trading fraud of which he believed he was a victim. He declared that the company cheated him out of a large amount of money because of his poor English capacity. He did not know who he should seek help from to write a report to submit to the bank and the police for the investigation. The authors advised him to seek translation services or legal aid from lawyers but he refused because he did not want to expose his trouble to anyone, including his son and wife. He wrote the report in English with the assistance of GTA and then asked the authors to help edit his grammar and spelling. When the edited report was completed, he used the translation tool to translate the report into Vietnamese to check if the edited version fully conveyed his ideas, thoughts and accurate information. In this way, Dat explained that he was confident to deal with the authorities and re-told them his story.

The above-mentioned cases demonstrate that digital literacy that extends to MAT applications greatly assists Vietnamese older migrants to tackle language constraints. This contributes to digital homing, by expanding their sense of belonging to incorporate a sense of connection to the host society. Though the MAT tools can only partly address language obstacles, migrant grandparents feel more confident and independent in managing their overseas lives. This greatly supports their social integration and adaptation process, which, over time, benefit themselves, their adult migrant children, and the host society.

## 5. Discussion and Conclusion

Through examining the case of Vietnamese migrant grandparents, the salient role of ICTs in promoting life-course transitions is evidenced. Despite the changes and constraints faced in their transnational lives, including language barriers, lack of familiarity with their new living environment, limited digital skills and knowledge, differences in cultural beliefs and practices, visa restrictions and travel limitations applied by the receiving country, care burdens, loss of social connections and support from their homeland, isolation, boredom, depression, and difficulties in accessing social and aged care services, they have used digital technologies with the assistance of family members to address those challenges. Research findings indicate that not all grandparents are proficient with digital skills and knowledge before their migration. However, digital citizenship, which is developed through the migration process as a part of lifecourse learning, can help older migrants cope with their increasingly transnational lives. Longings for connecting with distant families, gaining new skills and knowledge for better adaptation

and integration into the host society, and finding out about global events are some of the main motivations that inspire grandparents to learn how to use these advanced applications.

In this way, digital citizenship facilitates grandparents' digital kinning processes, through which transnational SSNs and caregiving are sustained. Network maps illustrated with the pie model depict growing diversity, frequency and quantity of virtual and distant SSNs. This confirms the growing salience of ICTs in older migrants' transnational lives, in particular in times of crisis such as the Covid-19 pandemic. In addition, digital homing practices for place-making (van Riemsdijk, 2014) and home-making (Wilding et al., 2022) can help older migrants adapt to their new living environment. Consequently, migrant grandparents become more independent and confident to manage their overseas lives on their own. ICTs play a significant part in preserving grandparents' cultural and social identities through digital kinning and digital homing practices, aiding the reduction of their nostalgia, loneliness, isolation, and boredom. In particular, digital kinning and digital homing reduce the impact of family separation, enabling the continuity of transnational care exchanges. Despite long or short histories of digital engagement, through the lifecourse digital learning, Vietnamese grandparents prove that they can become "digital citizens" who can use the internet frequently and effectively on a daily basis to aid their late lifecourse transitions overseas.

What is highlighted in this article is the role of digital citizenship in facilitating older migrants' lifecourse learning despite existing stereotypes against their learning capacity in the literature (Lee et al., 2011). Empirical studies have identified numerous factors including availability, affordability, social and economic capital, education, motivation, marital status, technical interest, health, age, and gender (Lee et al., 2011; Peacock & Künemund, 2007; Schutter et al., 2017; Selwyn et al., 2003) that can influence older people's lifecourse digital learning. However, our research findings indicate that these constraints are not insurmountable barriers to older migrants' digital engagement. All grandparent participants possess at least a digital device and can access unlimited internet supplied by their family members. They also do not face interpersonal limitations (Friemel, 2016) as their family members and friends can provide ongoing support for them. Though some grandparents face functional constraints and lack of motivation (Schreurs et al., 2017) and need multiple support in their digital engagement processes, they are consistently using the devices for specific purposes, predominantly in practising transnational kinning to exchange transnational caregiving and maintain SSNs. Moreover, their lifecourse digital learning processes are not constrained by social and economic capital, gender disparity, age, marital status, and health as both male and female, married and widowed, young-old and old-old, high- and-low social-status grandparents are employing digital technologies in their own ways to cope

with the challenges posed by their late lifecourse transitions due to migration.

These findings appear to present a universally positive and optimistic account of the role of learning ICTs in the life transitions of older migrants. Indeed, they reflect the largely positive accounts of the participants in this study. However, we do note that some elements of a digital divide inform this primarily harmonious account. Our research findings identify some differences in motivation and educational and professional occupation backgrounds that influence Vietnamese migrant grandparents' lifecourse digital learning. Empirical studies indicate that older adults with higher educational attainments and professional occupations often have good digital skills and knowledge because they might have had a long history of digital engagement during their learning and work journeys (Peacock & Künemund, 2007; Selwyn et al., 2003). They are capable of acquiring new knowledge and skills because of their ongoing lifecourse learning habits and self-efficacy (Friemel, 2016). Our research findings support this evidence when comparing motivation, frequency, and purposes of using ICTs among grandparent participants. The grandparents with high educational attainments (tertiary and higher education) are better at digital engagement; they can use ICTs for diverse purposes, including entertainment, self-learning, information searching, and social interaction. These grandparents show greater eagerness to learn new digital skills and knowledge to keep up with rapid technological advancements. Meanwhile, the grandparents with general or vocational educational attainments are often less engaged with digital devices and online platforms. Several of them only began using digital technologies after their migration. They mainly learn to use one or two types of digital technologies to practise digital kinning and digital homing rather than searching for desirable information and using MAT and navigation applications. These grandparents have less motivation to continue learning complicated digital skills and to increase their knowledge than their counterparts with higher educational attainments.

Despite differences in digital engagement, self-efficacy, functional constraints, and educational and professional attainments, Vietnamese migrant grandparents all reported appreciating the role of ICTs in helping them cope with the challenges faced in their lifecourse transitions due to late-life migration. Learning how to use ICTs is a part of their lifecourse learning journey, in which family members play a crucial role in supporting them in terms of technical advice and emotional support. The research calls for more projects on transferring teaching and learning digital skills to diaspora communities. In addition, peer-to-peer and family support should be recognized as a key part of interventions promoting older migrants' engagement in ICTs for their well-being. Despite the research findings indicating no significant emotional ambivalence or instrumental barriers in migrant grandparents' digital engagement for lifecourse

transitions, we acknowledge the importance of further empirical research with transnational grandparents for comparison and contrast.

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### Conflict of Interests

The authors declare no conflict of interests.

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