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# Migrants' Social Rights, Ethnicity and Welfare Regimes

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## Abstract

Comparative welfare state research has devoted little attention to the social rights of migrants or the ethnic/racial dimension, even though societies are becoming more ethnically diverse through international migration. Using data from the Luxembourg Income Study for the UK, the USA, Germany, France, Denmark and Sweden, this article represents an initial attempt to compare the social rights of migrants and citizens across welfare regimes. We examine the substantive social rights of migrants and ethnic minorities by focusing on their participation in social transfer programmes, and the impact of transfers on their ability to maintain a socially acceptable standard of living compared with the rest of the population. The analysis shows that there are major disparities between how migrant and citizen households fare in welfare states, and that the discrepancies widen for migrants of colour. When the analysis is confined to citizen households, the results largely correspond to the expected performance of welfare regimes. However, when migrants are incorporated into the analysis, intra-regime variations stand out in the case of the liberal and social democratic countries.

## Introduction

As mass migration continues on a global scale, societies are becoming increasingly multi-ethnic. The recent waves of newcomers have propelled the issue of immigration to the top of the political agenda, and the 1990s witnessed an unprecedented amount of legislation on immigration and migrants' social rights. The media are filled with stories about the welfare dependency of foreigners, radical rightist parties have made gains in elections, and policy makers wrestle with problems of integration and social inclusion. At the same time, comparative research on welfare states and their impact on migrants and ethnic minorities is sorely lacking.

This article attempts to fill a void in the literature on welfare states and international migration through an exploratory, comparative analysis of the social rights of migrants and ethnic minorities in different welfare regimes. Comparative welfare state studies and theorising about welfare regimes have largely neglected the ethnic/racial dimension and the situation of migrants.[1] Instead, the existing

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studies on migrants' social rights are mainly one-country analyses (for example, Ginsburg, 1994; Tienda and Liang, 1994; Pedersen, 2000; Fix and Passel, 2002; ULF, 2002). The neglect in the comparative research is all the more surprising in view of the current emphasis on a series of 'new' risks confronting 'old' welfare states (for example, Esping-Andersen, 1999, 2002; Ferrara and Rhodes, 1999; Pierson, 2001).

The literature on international migration has primarily focused on the challenge of immigration to the nation state, highlighting the concepts of sovereignty, territoriality and citizenship as membership (for example, Joppke, 1998; Soysal, 1994). This literature has paid less attention to the challenge of immigration to the welfare state and social citizenship, and its discussion of migrants' social rights is marred in several ways. First, it concludes that social rights are based on legal residence and not on nationality (for example, Guiraudon, 2000: 77; Kondo, 2001). Although this conclusion is largely correct, if not elaborated upon, it is deceptive because it gives the impression that the main dividing line in entitlements is between undocumented migrants and legal residents. Nor are the growing disparities between the social rights of refugees, asylum seekers and other migrants usually dealt with.[2] Most importantly, this discussion does not distinguish between formal and substantive social rights. Lastly, the analysis is often confined to ethnic groups and fails to compare policy outcomes for migrants with those for the non-immigrant population.

To move beyond the shortcomings of these two bodies of literature, we examine the substantive social rights of migrants and ethnic minorities in different welfare regimes by focusing on their participation in social transfer programmes in comparison with the rest of the population. The article is structured in the following way. First we discuss welfare regimes, their theoretical implications for migrants' social rights, and our choice of countries. The second section deals with the data, methods and operationalisations used in our study. Subsequently we analyse the outcomes for all migrants and the rest of the population, or more precisely migrant *vis-à-vis* citizen households. To capture the impact of the ethnic/racial dimension, we also deal with the outcomes for migrants from non-EU countries and especially those coming from the developing countries, since they are often people of colour.

## Welfare regimes and migrants' social rights

Our point of departure is Gøsta Esping-Andersen's regime typology (1990), which classifies countries in terms of three types: the liberal regime, the conservative corporatist regime, and the social democratic regime. Two key concepts underpinning the typology as dimensions of variation are decommodification and stratification. These concepts also guide our research questions about

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migrants' social rights. Esping-Andersen utilises decommodification to assess the quality of social rights in welfare regimes. The main criterion in evaluating social rights is the degree to which they provide a decent standard of living independently of market forces. On this basis, the quality of social rights can be gauged according to the accessibility of benefits, their generosity and duration, and the range of entitlements.

The concept of decommodification, however, is plagued by a fundamental difficulty: its dual meaning. In a narrow sense, decommodification presupposes commodification: that is, one's labour power has become a commodity by virtue of being sold on the labour market. In Esping-Andersen's words, 'The concept of decommodification has relevance only for individuals already fully and irreversibly inserted in the wage relationship' (1999: 45). Decommodification conceptualised in this manner may be of less relevance to some migrants and ethnic minorities. Many migrants have a hard time getting employment or they have a weak attachment to the labour market. Furthermore, just as in the case of women, policies that commodify migrants – that is, policies that improve their access to paid work – can be a useful strategy. However, a narrowly conceived notion of decommodification diverts attention from this course of action. An additional problem is that Esping-Andersen's operationalisation of decommodification may be misleading in the case of migrants and ethnic minorities. His decommodification scores for different countries are based on data for the average production worker in a highly paid manufacturing sector (1990). The scores might indicate the quality of the social rights of this type of worker, but the question remains whether they sum up the quality of migrants' or ethnic minorities' social rights.

In a broad sense, decommodification refers to the ability to enjoy an acceptable standard of living independently of market participation (1990: 37). Esping-Andersen specifies that decommodification occurs when a service is rendered as a right, when rights are not granted strictly on the basis of performance, and when a person can maintain a livelihood without reliance on the market (1990: 21–2). It is in this sense that we use decommodification, and we define an acceptable standard of living in minimal terms: a standard above the poverty line. This sort of conceptualisation offers a useful lens in analysing the situation of migrants. It allows us to examine to what degree welfare states provide migrants – and especially those outside the labour market – the possibility of a socially acceptable life.

The second concept of importance for our discussion is stratification. Esping-Andersen argues that, although the welfare state affects structures of inequality, it constitutes a system of stratification. He contends that a particular pattern of stratification is associated with each regime (1990). Our approach is more open and focuses on the stratifying effects of conditions of eligibility and benefit levels. Conditions of eligibility stratify persons in terms of whether or they are entitled

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to particular benefits, and differentials in benefit levels lead to a stratification of beneficiaries.

In summary, using these two concepts we pose two major questions regarding migrants' substantive social rights. First, how decommodifying are social policies for migrants and ethnic minorities in different welfare regimes? Or put differently, what role do social policies play in aiding migrants and ethnic minorities to maintain an acceptable standard of living? Second, what are the stratifying effects of social policies for migrants and ethnic minorities?

To answer these questions we examine two countries representing each regime type: the United Kingdom and the United States represent the liberal regime; Germany and France the conservative corporatist regime; and Sweden and Denmark the social democratic regime. By selecting two countries for each regime, we have tried to reduce problems involved in taking a single country as the exemplar of a regime type. A principal difficulty is that conclusions about regime types are based on the countries chosen to represent the particular regime, but specific features of the countries are likely to influence the conclusions.[3] The problem is exacerbated because at this point we know very little about the similarities and differences along the ethnic/racial dimension across regime types. A wider selection of countries is particularly important given the exploratory nature of our analysis. Unfortunately, however, data limitations have prevented us from including more than two countries for each regime.

A few words about the decommodifying and stratifying effects of the three regime types are necessary in order to hypothesise their possible implications for the social rights of migrants and ethnic minorities. According to Esping-Andersen (1990), the typical features of the liberal regime are a heavy reliance on means-tested programmes and a strong preference for market solutions. Means-tested benefits are targeted to a limited clientele of the needy, and social insurance schemes provide modest benefits. Social policies stratify the population into the poor and non-poor, and their decommodifying effects are minimal, given the prominence of the market. The conservative corporatist regime is characterised by social insurance schemes that offer generous benefits based on rigorous work tests, and these work-related schemes are administered by corporatist structures representing employers and workers. The stratifying effects of social policies perpetuate traditional status relations, and decommodification levels are relatively high for full-time workers permanently in the labour force. The social democratic regime features a combination of universal schemes whose entitlement is based on citizenship or residence, and programmes with high replacement rates that compensate for loss of earnings. This combination diminishes the importance of the market, enhancing decommodification; and emphasis on universalism minimises the stratifying effects of social policies.

So far there has been little speculation about how the three types of regimes might influence migrants' social rights and virtually no discussion about their

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influence on ethnic minorities' rights. One of the few scholars to make such speculations is Keith Banting (2000), who maintains that the type of welfare regime affects the likelihood of migrants' inclusion in social policies. Expansive welfare states of both the conservative and social democratic regime types tend to introduce restrictive immigration controls but extend benefits to migrants. He argues that employment-based social insurance schemes are more amenable to the incorporation of migrants primarily because they entail contributions. The effects of contributions are to delay entitlements and to confer earned rights. Countries with strong welfare regimes have been more successful in incorporating newcomers without eroding mass support for the welfare state. By contrast, countries with liberal welfare regimes, excluding Canada, have encouraged immigration, while limiting migrants' access to social benefits. The prominence of means-tested benefits in liberal regimes produces a different dynamic. Perceptions that foreigners rely heavily on social assistance have prompted restrictions of their eligibility to benefits and fragmented support for the welfare state (2000: 21–5).

As distinct from Banting, who emphasises the incorporation of migrants into benefit programmes, the focus here is on decommodification and the assumption that the levels of decommodification achieved by welfare states will influence migrants' economic outcomes. In terms of welfare regimes, one would expect better outcomes for migrants in countries with high levels of decommodification (the social democratic welfare regime) and worse outcomes in countries with low levels of decommodifaction (the liberal welfare regime). Conservative welfare regime countries are expected only to decommodify those in employment, and consequently provide only moderately good outcomes for migrants. None the less, there is a hitch here because these expectations build on Esping-Andersen's results, which are based on decommodification scores that assume labour market participation and assign lower values to means-tested programmes.

## Data, definitions and methods

The results presented here are based on data from the Luxembourg Income Study (see the Appendix for a list of the years and surveys). The Luxembourg Income Study (LIS) is a cross-national data set with detailed information about sources of household income in over 20 countries. Because the main income variables – disposable income, gross income and market income – are harmonised, LIS constitutes a very useful data bank for analysing poverty, income distribution and inequality across countries. By providing information about who receives social transfers and how much they receive, LIS also furnishes possibilities to go beyond formal rights and assess substantive social rights.

However, the possibilities for identifying migrants in the LIS data have been quite limited,[4] and comparability among countries for which this possibility exists

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is far from ideal. The LIS data sets contain two variables that can be used to identify the migrant and ethnic population. The first variable is the immigration status of the head of the household, and the second variable is the ethnicity/nationality of the household head, but there is no uniformity among countries in terms of availability and the content of these variables (the content of these variables and the problems of comparability are discussed in more detail in the Appendix). Because of these inequivalencies, we have taken the common denominator across these data sets to define the migrant population. Accordingly, we define migrants as foreign born who are non-citizens and report our results for migrant and citizen households. Citizen households refer to households headed by a person holding the nationality of the country, regardless of place of birth. Given these difficulties, our results should be considered as preliminary.

Ethnic minority migrants are those who are not from the member countries of the EU (prior to the 2004 enlargement) or North America and Australasia. This allows us to focus on the aspects of ethnicity and race because many of these migrants come from distant countries with dissimilar cultures and are often migrants of colour. For three of the European countries – Denmark, France and Sweden – it was possible to trace the country of origin. We have used this information to select the ethnic minority migrants. For the United States there was no information on country of origin, but using the ethnicity variable we can distinguish migrants of colour.

The British data are the most problematic. There is only an ethnicity variable and no variable for citizenship status or land of birth. In this instance, we are forced to use ethnicity as a proxy for immigration. The adult white population (aged 18 and over) is overwhelming born in Britain (95.2 per cent), while the adult population of the other ethnic groups is generally foreign born (75.2 per cent) (calculated from the 1991 census, vol. 2: 636).[5] Accordingly, the white category serves as the non-migrant group for the analyses, even though EU citizens and other 'white' migrants are likely to be represented. Similarly, the other ethnic categories represent the migrants, despite a number of British-born being likely to be included in the sample. Once again, the exploratory nature of our analysis must be stressed.

The measurement of poverty comprises a central aspect in our operationalisation of decommodification: the ability to enjoy a socially acceptable standard of living independently of the market. We define an acceptable standard of living as a standard above the poverty line, and adopt a relative approach in measuring income poverty among migrants and citizens. This means that poor households are defined as those households that have a disposable income below a certain threshold representing the level of well-being of the population in a specific country. As in most comparative studies, we use 50 per cent of the median income adjusted to family size as the poverty line. To adjust for family size, we employ the OECD equivalence scale.[6]

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All households have been included in the analysis in order to illuminate the full decommodification capabilities of the welfare states. The decision to include the entire population and not to limit selection to households within the working age has important implications for our results regarding the incidence of poverty and poverty reduction effectiveness. Our analysis encompasses pensioners, and their income differs from that of the working age because of the importance of social benefits.[7] In addition, the age structure of the migrant populations differs from that of the citizen populations. Generally, the migrant population has been younger with fewer pensioners. However, this is changing as the migrants who entered the countries in the 1960s and 1970s reach retirement age and as family reunification becomes a major source of immigration. In fact, elderly migrants appear to be much more vulnerable to poverty than elderly citizens in several countries.

One way we gauge the decommodifying effects of social policies (transfers and taxes) is through relative poverty reduction effectiveness scores.[8] The scores measure the extent of poverty reduction through the percentage of pre-transfer poor lifted above the poverty line by transfers and taxes. To compute the scores we compare the economic situation of households before transfers and taxes and after transfers and taxes, using the following formula:

Poverty reduction effectiveness (%)((Poverty rate based on market income – Poverty rate based on disposable income/ (Poverty rate based on Market Income)) = *100 (Mitchell, 1991: 65).

The poverty rate based on market income is used as a measure for the pre taxes and transfers situation. Market income is comprised of earnings and salaries, income from self-employment, and returns on capital. The poverty rate based on disposable income adjusted for family size serves as a measure for the situation after transfers and taxes. The difference between the two provides a measure of the effectiveness of transfers in lifting people above the poverty line, and the decommodifying effects of social policies. By comparing migrant and citizen households we can shed light on the question of whether transfers and taxes have a different impact on the economic situation of the two groups, and accordingly whether the decommodifying effects are different.

## Social rights and decommodification

Formal social rights do not guarantee decommodification (that is, an acceptable standard of living independent of the market). In this section, we examine decommodification in relation to migrant and citizen households across welfare regimes. As a first step, we determine the incidence of households having a socially acceptable standard of living: that is, the proportion of households above the poverty line. Obviously this outcome is the combined result of market income and social benefits. To disaggregate the effects of the two, we analyse the

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TABLE 1. Households (A) above the poverty line (Percentages) and (B) below the Poverty line (Percentages).

| Country | All households | Citizen households | Migrant households | Ethnic minority migrant households |
|---|---|---|---|---|
| | | (A) | | |
| United Kingdom | 90.1 | 90.9 | – | 75.6* |
| United States | 83.3 | 85.0 | 62.4 | 58.3 |
| Germany | 92.7 | 93.7 | 76.4 | – |
| France | 92.1 | 93.3 | 76.1 | 63.8 |
| Denmark | 92.4 | 93.8 | 63.6 | 55.7 |
| Sweden | 94.3 | 94.5 | 90.2 | 88.2 |
| | | (B) | | |
| United Kingdom | 9.9 | 9.1 | – | 24.4* |
| United States | 16.7 | 15.0 | 37.6 | 41.7 |
| Germany | 7.3 | 6.3 | 23.6 | – |
| France | 7.9 | 6.7 | 23.9 | 36.2 |
| Denmark | 7.6 | 6.2 | 36.4 | 44.3 |
| Sweden | 5.7 | 5.5 | 9.8 | 11.8 |

*Notes*: – Data unavailable, * refers to ethnic minority households with unknown immigration status.
*Source*: Luxembourg Income Study; own calculations.

impact of social policies on household income, using relative poverty reduction effectiveness scores. In this way we can establish the role of these policies in reducing poverty or, conversely, in maintaining a socially acceptable standard of living. Subsequently we examine the poverty rates of households by major source of income: market income and social transfers. This provides another measure of decommodification by indicating the likelihood of being at risk of poverty when social transfers are the main source of livelihood compared with earnings.

The proportions of households with a socially acceptable standard of living are reported in the upper section (A) of Table 1. Looking at the first two columns that present the percentages of all households and citizen households, the overall picture corresponds fairly well with the expected performance of the three welfare regime types. The highest proportion of households enjoying an acceptable standard is found in a country representing the social democratic welfare regime, followed by the conservative corporatist regime countries, with lower proportions in the liberal regime countries.[9] Turning to migrant households, we find that they are less likely to be above the poverty line than citizen households across welfare regimes. The disparities for migrant households from the third world and non-EU countries are even more striking.

As can be observed in the lower section (B) of Table 1, significant proportions of migrant households are below the poverty line, and this is more pronounced for ethnic minority migrant households. These results suggest that both immigration status and ethnicity/race are associated with a higher risk of poverty. In the US

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case, the data allow us to separate ethnicity and immigration status. They show that ethnic and racial minorities have higher poverty rates than whites, but households in all categories, including whites, headed by an migrant have higher poverty rates than households headed by a citizen in the same ethnic/racial category.

Across the countries there is substantial variation in the poverty rates: ranging from nearly 10 per cent to approaching 40 per cent for all migrant households, and from 12 per cent to 44 per cent for ethnic minority migrant households. However, the pattern of variations does not conform to expectations based on levels of decommodification by welfare regime type. Intra-regime variations stand out more than differences between welfare regimes. Although France and Germany – the two conservative corporatist regime countries – display nearly identical poverty rates for citizen and migrant households (6–7 per cent and 24 per cent respectively), there are considerable differences between the two liberal regime countries. Most striking, however, are the differences between the two social democratic regime countries. Of all the countries, Swedish poverty rates for migrants and ethnic minorities are the lowest, while Danish poverty rates are the highest for ethnic migrant households and second highest for all migrant households (Table 1).[10]

The magnitude in the differences between migrant and citizen households follows the same pattern. In the two social democratic regime countries, the percentage differences between the poverty rates of migrants and citizens were largest in Denmark and smallest in Sweden. Although less dramatic, dissimilar percentage differences occur in the two liberal regime countries, where the United States had the second largest difference between the citizen and ethnic migrant households, and the United Kingdom the second smallest difference. Only in the two conservative corporatist regime countries were there similar percentage differences.

So far we have established that significant differences exist between citizen and immigrant households in maintaining a socially acceptable standard of living. Now we turn to the decommodifying effects of social policies based on relative poverty reduction effectiveness scores. To what extent have social benefits pulled pre-transfer poor households out of poverty across welfare regimes?

Figure 1 presents the pre- and post-transfers and tax poverty rates of citizen and migrant households, and the relative poverty reduction effectiveness scores for each type of household. The percentages at the bottom of the figure are the poverty reduction scores, which tell us the proportion of the pre-transfer poor that was lifted above the poverty line via transfers after taxes.

Across countries the decommodifying effects ranged from a mere 13.4 per cent to 83.2 per cent for migrant households, and from 40.2 per cent to 82.1 per cent for citizen households. That is, social policies lifted between 13 per cent and 83 per cent of the pre-transfer poor migrant households and between 40 per cent and 82 per cent of citizen households above the poverty line.

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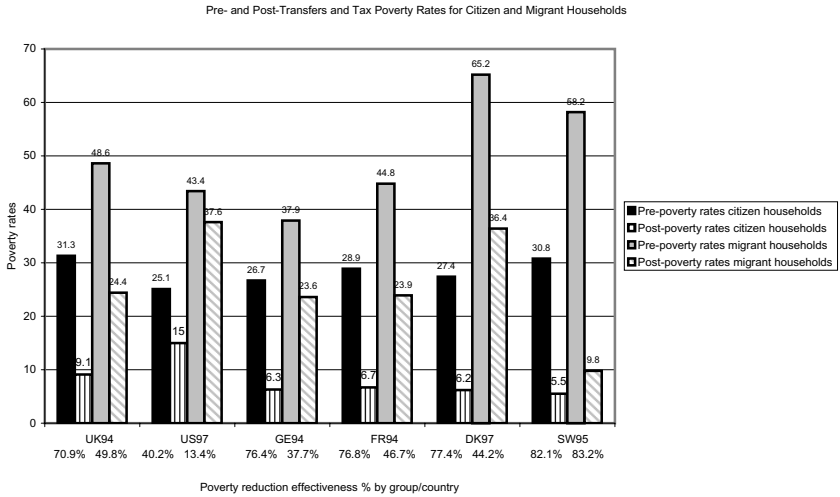



Figure 1. Pre- and post-transfers and tax poverty rates for citizen and migrant households.

A comparison of the poverty reduction scores indicates that transfers had greater decommodifying effects for citizens than for migrants in all the countries, except in Sweden. Furthermore, in the Swedish case, the scores for citizens and migrants were nearly the same. By contrast, there were sizeable differences in the scores for migrants and citizens in the other countries. In the United States transfers scarcely altered the poverty status of migrant households, but benefits aided 40 per cent of poor citizen households. Elsewhere the scores for migrants were in the neighbourhood of 38 per cent to 50 per cent, while the scores for citizens ranged from slightly over 70 per cent to 77 per cent. In other words, not only are citizens more likely to be above the poverty line, if citizens are poor before transfers they are more likely to be lifted above the poverty line compared with migrants.

Nor do the relative poverty reduction effectiveness scores in Figure 1, which we use as decommodification indices, cluster according to welfare regime. Admittedly, the decommodifying effects of social policies are lowest for both migrant and citizen households in the United States, and they are highest for both types of households in Sweden, as one might anticipate. However, contrary to expectations, it is in a liberal regime country – the United Kingdom – and not in the social democratic regime country – Denmark – that the decommodifying effects of social policies for migrant households rank second highest. Instead, Denmark clusters together with France and Germany in terms of decommodification scores for both migrants and citizens, and the percentage differences in decommodifying effects of transfers for citizens and migrants were the largest in these three countries.

Our final measure of decommodifying effects rests on the broad conceptualisation of decommodification: the ability to enjoy a socially acceptable

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standard of living, independent of market participation. In effect, it offers a litmus test of decommodification, in that we can establish whether welfare states provide persons outside the labour market the possibility of a decent standard of living. This type of comparison also controls for the importance of the disadvantageous position of many migrants on the labour market, which may account for the higher poverty rates of immigrant households. Furthermore, by comparing the poverty rates of households reliant upon transfers with those dependent upon earnings, we can elucidate another aspect of decommodification: the lack of a penalty for exiting the market.

Figure 2 sets out the poverty rates of citizen and migrant households by main source of income. The upper graph presents the rates for households whose main income is earnings, and the lower graph the rates for households whose main income is transfers.

Unsurprisingly, in all countries, households whose main source of income is earnings are much more likely to enjoy an acceptable standard of living compared with those where benefits make up the bulk of their income. However, migrant households with earnings consistently have higher poverty rates than citizen households. Especially in the United States but also in Denmark and Germany, a large portion of migrant households are below the poverty line in spite of earnings, suggesting poorer pay or a weaker attachment to the labour market.

Turning to households whose main source of income is social transfers, citizen households have lower poverty rates than migrant households in all countries. However, in Sweden the difference is small, and Swedish migrant households have lower poverty rates than citizen households in the other countries. Otherwise there are substantial gaps between citizen and migrant households in enjoying an acceptable living when their main source of income is transfers. In this instance the gap was largest in the cases of the United States and Germany, followed by Denmark.

Lastly, there is a much smaller penalty for exiting the market in Sweden for both citizen and migrant households compared with the other countries. Households in Sweden irrespective of their main source of income stand a relatively good chance of being above the poverty line. At the other extreme, households in the United States, regardless of their type of main income, run a higher risk of being poor, and despite this they also face a very stiff penalty if they leave the market. In the remaining countries, there is a high penalty for exiting the market, and it is considerably higher for migrant households (Figure 2).

With respect to regime types, the decommodification of citizen households largely conforms to expectations, as does the performance of the two outliers: the United States and Sweden. Comparing citizen households across regimes, the two liberal countries exhibit the highest poverty rates and the least decommodification. Furthermore, the poverty rates of both citizen and migrant households in the United States ranked highest, whereas the poverty rates

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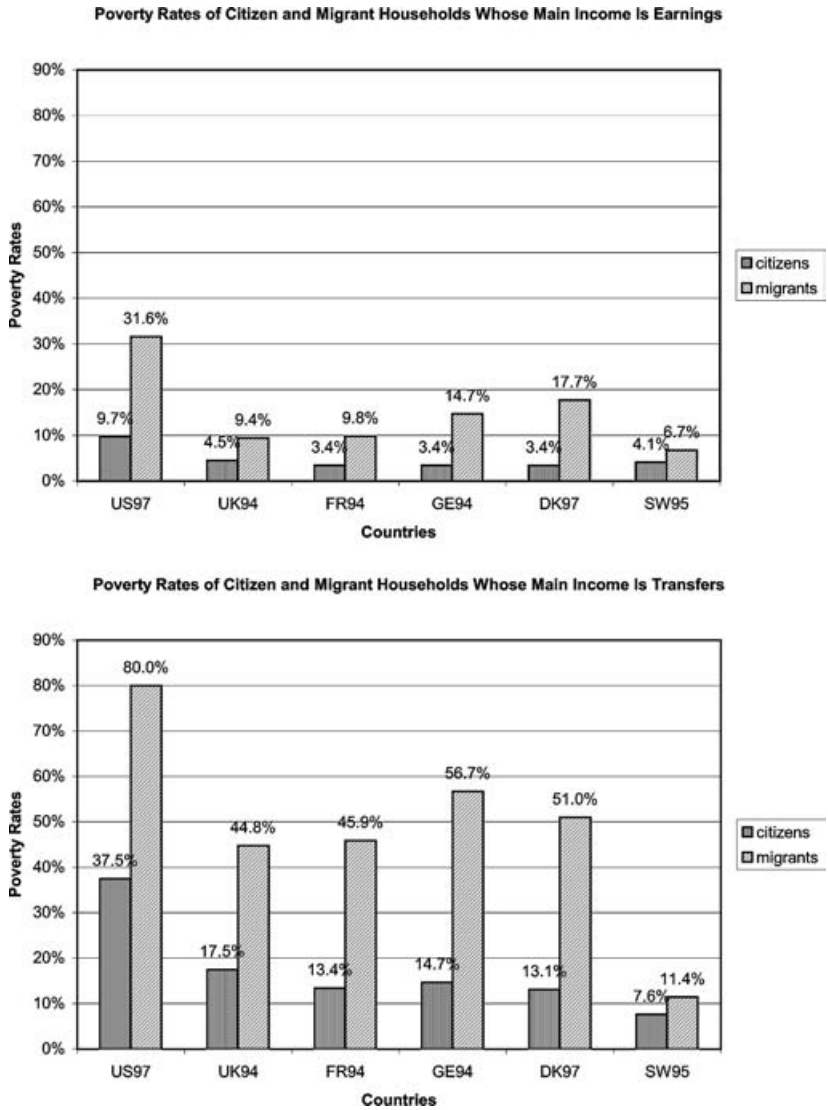



Figure 2. Poverty rates of citizen and migrant households by main source of income.

were lowest in Sweden, again matching expectations. The main departure from expected results is that the remaining countries cluster together, especially with regard to households whose main source of income is benefits. The poverty rates of citizen households ranged from 13 per cent to 18 per cent, and those of migrant households from 45 per cent to 57 per cent.

To sum up, the decommodifying effects of social policies are different for citizens and migrants across welfare regimes. Overall, citizens are more likely to

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enjoy a socially acceptable standard of living than migrants. If citizens fall below the poverty line prior to transfers, they are more likely to be lifted out of poverty by social benefits than migrants. Finally, citizens confront a lower penalty if they are outside the labour market; citizen households whose main source of income is transfers are much less likely to be at risk of poverty compared with migrant households.

## Social rights and stratification

One dimension of stratification, already touched upon in our analysis of decommodification, is the degree to which policies encourage or fail to prevent a dualism between the poor and the non-poor. A second dimension is differentiated patterns in access and participation in social programmes. A third dimension is inequalities in benefits. In this section we examine the following issues: Are there differences in the access and participation patterns of citizens and migrants in social transfer programmes and in benefit levels? And what is the contribution of benefits to household income?

Table 2 shows the participation of citizen and migrant households in several major transfer programmes, as reflected in their utilisation rates. It needs to be underlined that the important comparisons are among households in the same country and not across countries. Inequivalencies make cross-country comparisons hazardous.[11]

An inspection of family benefits discloses that migrant and citizen households with minor children have very similar rates, except for France. The lower participation of French citizen households is due to the particular construction of family benefits: allowances for the first child were income-tested, and the natalist bent of benefits favours large families. Of all the transfer programmes, the utilisation of rates of family benefits by citizens and migrants come closest to parity.

Pensions display a very different pattern with far less migrant access. Among the elderly, migrant and especially ethnic minority migrant households have substantially lower utilisation rates than citizen households. Likewise, migrant households are disadvantaged in the case of unemployment benefits. The utilisation rates show that a larger proportion of citizens consistently receive unemployment benefits than that of migrants, despite the higher unemployment rates of migrants. Conversely, social assistance is utilised less by citizen households than immigrant households; and, where we have data for ethnic minority migrant households, they exhibit a higher utilisation rate than migrant households in general.

In sum, the data indicate that migrants have poorer access to pensions and unemployment benefits, but not to family benefits. Table 2 displays a stratified pattern of utilisation in the form of monotonic decreases or increases in migrant participation with regard to pensions and social assistance respectively. In the

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TABLE 2. Participation in social transfer programmes by type of household (Utilisation rates).

| | Family benefits % households with children | Pensions % elderly households | Unemployment benefits % unemployed households | Social assistance % households |
|---|---|---|---|---|
| United Kingdom | | | | |
| Citizens | 97.2 | 88.2 | 46.9 | 30.7 |
| Migrants | 96.3 | 62.6 | 21.2 | 49.3 |
| United States | | | | |
| Citizens | na | 90.8 | 28.1 | 32.0 |
| Migrants | na | 65.2 | 24.7 | 56.9 |
| Ethnic Migrants | na | – | – | 62.1 |
| Germany | | | | |
| Citizens | 97.0 | 90.2 | 30.5 | 14.0 |
| Migrants | 91.6 | 83.3 | 27.3 | 34.7 |
| France | | | | |
| Citizens | 72.7 | 97.9 | 73.0 | 23.7 |
| Migrants | 82.2 | 92.1 | 70.3 | 45.4 |
| Ethnic Migrants | 85.1 | 75.0 | – | 62.8 |
| Denmark | | | | |
| Citizens | 98.2 | 86.8 | – | 29.1 |
| Migrants | 98.4 | 51.1 | – | 50.5 |
| Ethnic Migrants | 98.8 | 25.0 | – | 66.5 |
| Sweden | | | | |
| Citizens | 96.0 | 95.3 | 41.9 | 26.1 |
| Migrants | 98.7 | 69.5 | 36.6 | 52.2 |
| Ethnic Migrants | 98.9 | 19.2 | – | 79.4 |

*Notes*: na = Not applicable and – indicates that data are not available.
*Source*: Luxembourg Income Study; own calculations.

case of pensions, citizens' participation is nearly universal, followed by less participation of migrant households, and even lower participation by ethnic minority migrant households across the countries. The reverse was true in the case of assistance. Citizens participate least, with a major leap in participation of migrants and a further increase of ethnic minority migrants.

To what extent do benefit inequalities between citizen and migrant households exist? To explore this issue, we examine the benefits paid to citizen and migrant recipients. Table 3 reports the average payments in the currency of the country. Migrants' benefits tend to be lower for typical social insurance benefits, such as pensions and unemployment compensation.[12] A notable exception is unemployment benefits in the UK, but it is worth recalling that many migrants do not receive these benefits. The gap between citizen and immigrant households' utilisation rates was greatest in the UK (Table 2). On the other hand, migrants fared much better with regard to family benefits and social assistance, receiving higher payments than citizens.

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TABLE 3. Benefit levels in social transfer programmes by type of recipient household (Average (mean) amount of payment).

| | Family benefits | Pensions | Unemployment benefits | Social assistance |
|---|---|---|---|---|
| United Kingdom | | | | |
| Citizens | 948 | 4,060 | 2,528 | 2,650 |
| Migrants | 1,109 | 3,631 | 2,787 | 3,783 |
| United States | | | | |
| Citizens | na | 11,941 | 3,185 | 2,729 |
| Migrants | na | 9,549 | 2,899 | 2,891 |
| Germany | | | | |
| Citizens | 2,135 | 25,664 | 10,109 | 8,536 |
| Migrants | 2,854 | 25,751 | 7,656 | 9,741 |
| France | | | | |
| Citizens | 17,030 | 103,833 | 47,803 | 15,927 |
| Migrants | 25,756 | 68,952 | 35,992 | 18,207 |
| Ethnic Migrants | 30,025 | 56,048 | 34,110 | – |
| Denmark | | | | |
| Citizens | 16,614 | 101,973 | – | 15,564 |
| Migrants | 20,993 | 88,491 | – | 74,325 |
| Ethnic Migrants | 23,779 | – | – | 86,510 |
| Sweden | | | | |
| Citizens | 16,867 | 124,184 | 93,046 | 22,199 |
| Migrants | 17,497 | 109,914 | 70,157 | 63,590 |
| Ethnic Migrants | 17,984 | 76,921 | 62,646 | 86,510 |

*Notes*: na = Not applicable and – indicates that data are not available or the number is too small for reliable estimates.
*Source*: Luxembourg Income Study: own calculations.

Figure 3 presents the income packages of citizens and migrant households by regime type. Looking first at the split between earnings and transfers, the United States stands out on two counts. First, earnings form a larger component of the income packages of migrants and citizens than in the other countries, as one might expect of the liberal welfare regime. Second, earnings comprise an even greater proportion of migrants' income package, a huge 80 per cent. Earnings contribute more than benefits to the income packages of both types of households also in Germany (nearly 70 per cent) and France (close to 60 per cent). Furthermore, in these three countries the importance of earnings to the income packages of migrants is equal to or larger than their role in citizens' income packages. In the remaining three countries – Denmark, Sweden and the UK – earnings make up a smaller portion of the income packages of both migrants and citizens; earnings constitute approximately half of household income as do social transfers. Earnings also contribute less to the income packages of migrants than those of citizens. In this respect the countries divide into two groups rather than three welfare regimes.

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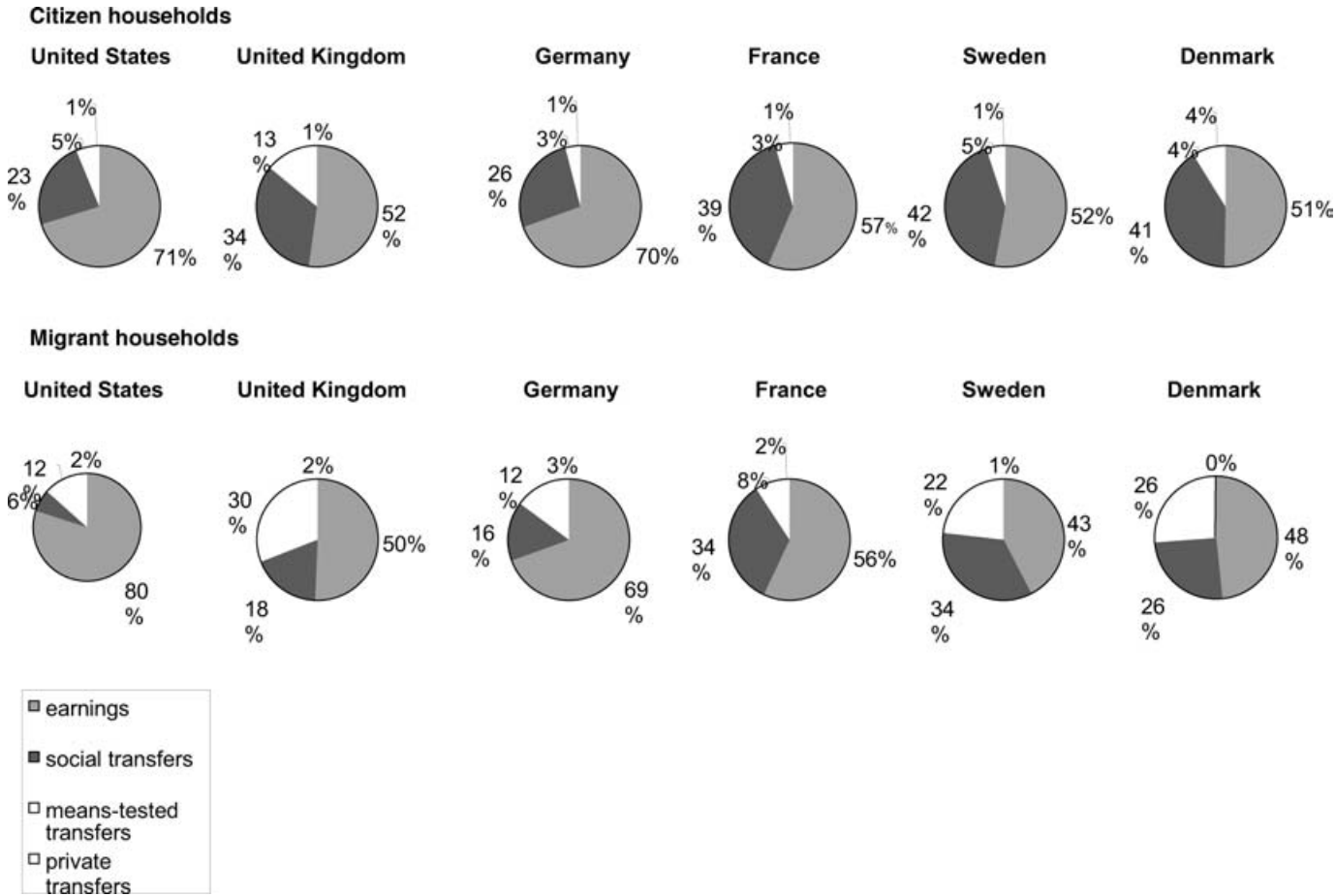



Figure 3. Income packages of citizen and migant households by welfare regime and country.

The figure further reveals a common denominator across countries: means-tested benefits play a larger role in the income packages of migrants compared with citizens' income packages. However, in all countries with the exception of the United States and the United Kingdom, the share contributed by other social transfers equalled or exceeded that of means-tested benefits.

Looking specifically at the importance of means-tested benefits for ethnic minority migrant households' income packages for countries where we have data (Denmark, France and Sweden), we find means-tested benefits comprise a larger portion of their income packages than these benefits do in the income packages of all migrants. In the most extreme cases in Sweden and Denmark, means-tested benefits comprised between 40 and 50 per cent of their income packages. None the less, other social transfers also made an important contribution to these households in the three countries. For the US, our data reveal discrepancies between citizens and migrants with regard to the contribution of regular social transfers to household income. For migrant blacks, Hispanics and Asians, other social transfers were a much smaller share of their income package than for citizens in the same ethnic group.

In conclusion, an important dimension of stratification has to do with the differential capacities of social programmes in maintaining a socially acceptable standard of living, or preventing a dualism between the poor and the non-poor. Our earlier analysis disclosed such a dualism. There is a higher incidence of migrant households below the poverty line compared with citizen households, and ethnic minority migrant households are even more vulnerable to poverty.

Examining participation in a variety of transfer programmes, we found a differentiated pattern for citizens and migrants except in the case of family benefits. Migrant households have less access to unemployment benefits and pensions. Conversely, there is greater utilisation of social assistance by migrants, and means-tested benefits form a larger component in their income packages compared with citizens. The pattern was more pronounced for migrants from third world countries and non-EU countries. To the extent that social assistance is associated with stigma and inadequate benefits, the quality of migrants' social rights suffers and there is no parity with citizens' social rights. Furthermore, the larger role of means-tested benefits in migrants' income packages, together with higher utilisation rates across welfare regimes, does not fully square with Banting's line of argument about the prominence of means-tested benefits and heavier reliance of migrants on these benefits in the liberal regime countries.

Not only do migrant households have limited access to major insurance benefits, such as unemployment compensation and pensions; their benefit levels in these programmes are also lower, reflecting poorer earnings. Larger social assistance payments and family benefits to immigrant households offset inadequate insurance benefits, but not completely as evidenced in their higher poverty rates.

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Contrary to expectations, the smallest differentiation in citizens' and migrants' income packages is in the two conservative regime countries. Major differences exist between the income packages of citizen and migrant households along with their utilisation of means-tested benefits in the two social democratic regime countries. For many migrants in Denmark and Sweden, the stratifying effects of social policies run counter to the minimal stratification that supposedly typifies the social democratic welfare regime.

## Concluding remarks

In contrast to the widespread assumption in the international migration literature that there is little difference in the social rights of citizens and migrants who are legal residents, the preceding analysis found large disparities in how migrant and citizen households fare in welfare states. Furthermore, discrepancies widened with respect to migrants of colour. Compared with citizens, migrants and ethnic minority migrants are less likely to enjoy a socially acceptable standard of living, even when the market is the main source of their income. They are less likely to be pulled out of poverty by transfers, and when benefits are their main source of income they run a greater risk of being poor than do citizens.

Nor did we find that the decommodifying and stratifying effects of social policies for migrants corresponded to expectations based on welfare regime theorising, while the effects for citizens largely did. An analysis which does not single out migrants is unlikely to detect major differences because the foreign born in a country seldom account for more than 10 per cent of the population, and deviations are absorbed in the larger pattern for the entire population. When migrants are incorporated in the analysis, the robustness of the welfare regime typology survives mainly in the cases of the United States and Sweden. Otherwise the typology largely falls apart, with the social rights of migrants in the United Kingdom and Denmark posing the largest contradictions to the expected performance of regime types.

These contradictions raise two central issues concerning the welfare regime typology. The first revolves around the nature of the welfare regime of the two deviant countries. Social policy analysts (for example, Ginsburg, 1992; Castles and Mitchell, 1993; Cochrane *et al.*, 2001) have cast doubts on whether the United Kingdom and the United States represent the same type of welfare regime or welfare state. Indeed, facets of our analysis strengthen such doubts. Likewise, researchers (Esping-Andersen, 1992: 111–13; Korpi and Palme, 1998: 668–70) have questioned the regime status of Denmark. The important question here is whether dissimilar social policy constructions account for the differences in migrants' ability to enjoy a socially acceptable standard of living.

The second issue concerns the adequacy of the regime typology in analysing the social rights of migrants and the need to synthesise the insights of the

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international migration literature and comparative welfare state research. The international migration literature has emphasised differences in the immigration or incorporation regime as a source of variation in migrants' rights across countries (Castles and Miller, 1993; Soysal, 1994; Faist, 1995). The immigration or incorporation regime, which regulates migrants' inclusion in and exclusion from society, consists of rules and norms that govern migrants' possibilities to become a citizen, to acquire residence and work permits, to own property and run a business, and to participate in political life. In this instance the important question is whether the divergences are related to different immigration regimes. In short, research on migrants' social rights needs to consider the dynamics between welfare and immigration regimes (Kofman *et al.*, 2000; Songur, 2002; Sainsbury, 2003).

## Notes

1 Two comparative welfare scholars who have incorporated the ethnic/racial dimension in their analyses, and thus deserve mention as exceptions, are Fiona Williams (1993, 1995) and Norman Ginsburg (1992).

2 For a discussion of the differences in the social rights of migrant workers, refugees and asylum seekers, see Morris (2002) and Sainsbury (2003) (cf. Kofman *et al.*, 2000).

3 Ann Orloff (1996: 68) has cogently noted the difficulty of using single countries as exemplars of a regime, but in relation to gender.

4 For the latest available data, LIS has made considerable efforts to provide more detailed variables on immigration and ethnicity (for more information see country documentation at www.lisproject.org). Unfortunately, these data were not available when we conducted our analysis. Despite improvements, problems of comparability nevertheless remain because of country differences in terms of definitions and concepts used.

5 Both the census data and LIS data are for Great Britain rather the United Kingdom.

6 The OECD equivalence scale assigns a value of 1 to the first adult in the household, a value of 0.7 to any additional adults, and a value of 0.5 to each child. Different equivalence scales can produce substantial differences in poverty rates, and this appears to be particularly the case for migrants when household size differs from the average. For an example, see Berthoud (1998: 39–42).

7 For analyses of migrant and citizen households limited to the working age population, see Ann Morissens (2002, 2003).

8 Relative poverty reduction effectiveness scores have two major advantages compared with the decommodification scores used by Esping-Andersen. First, his scores are based on model recipients: the standard production worker in several OECD countries. Accordingly, his scores reflect a major weakness of the model recipient approach: they are based on hypothetical recipients, whereas we examine the economic outcomes of actual beneficiaries. Second, his scores assume commodification and underestimate or ignore the decommodifying effects of means-tested schemes.

9 The two liberal regime countries exhibit the lowest proportions of households with a socially acceptable standard of living, but one could also argue that the US deviates from all the other countries where at least 90 per cent of the households are above the poverty line.

10 We do not yet have an explanation for the Danish results, and we cannot rule out data idiosyncrasies. However, two other analyses utilising different databases point in the same

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direction. Using the European Community Household Panel (ECHP), Felix Büchel and Joachim R. Frick (2003) also found wide differences in the economic performance of migrants and citizens in Denmark. A comparative study of migrants' economic well-being in Denmark and Sweden (Blume *et al*., 2003) reports higher poverty rates among Danish migrants. In part, the higher rates were due to compositional effects. A larger proportion of the Danish migrants came from the developing countries and had higher poverty rates, but for nearly all nationalities, even those from developing countries, Swedish migrants had lower poverty rates than their Danish counterparts.

11 Taking unemployment benefits as an illustration, a major problem is different definitions of the unemployed in the Luxembourg Income Study. The German and Swedish surveys define the unemployed as persons not employed, which includes those not in the labour force. By contrast, in the US and French surveys the unemployed do not include persons out of the work force. These inequivalencies account for the lower utilisation rates in Germany and Sweden compared with France.

12 Our results for German pension payments deviate from those of Kurthen (1998), who found substantially lower benefits for migrants compared with citizens. His data were better equipped to identify migrants than the wave of LIS data used here.

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## Appendix

A more detailed description of the variables in data sets illustrates the problems of comparability across the six countries. In the US data set the ethnicity variable mixes race and ethnicity. It distinguishes between Black, Hispanic, Native American/Eskimo, Asian/Pacific Islander, and White. The immigration status of household head variable contains the following categories: native born, foreign-born naturalised citizens and non-citizens. For the 1997 wave of data, which we use, there is no information about the country of origin of the migrant.

The German data only allow us to distinguish between citizens and migrants who arrived during the period 1983–1994. For three of our European countries – Denmark, France and Sweden – there is information about the country of origin. A difficulty in the Danish and Swedish data is that the citizen category includes the foreign born who are naturalised citizens. In fact, we can only distinguish between the foreign-born who are citizens and those who are non-citizens in the French and US data.

The British data set contains only an ethnicity variable. As in the US case, the British ethnicity variable conflates race and ethnicity. It consists of the following categories: White, Black-Caribbean, Black African, Black-other, Pakistani, Bangladeshi, Indian, Chinese, Asian-other and Other.

The implication of these inconsistencies is that for all countries except the UK, the data are likely to overestimate the incidence of poverty because they include the most recent arrivals and exclude denizens who have become citizens. Previous research shows that the economic situation of migrants generally improves over time. Features of the British data work in contradictory ways. On the one hand, they potentially underestimate the incidence of poverty because the second and possibly the third generations are included, whereas newcomers are more prone to poverty because they often lack language skills and experience difficulties in securing employment. On the other hand, our data from the other countries indicate that ethnic minorities have higher poverty rates than the white population, and in this respect the British data probably result in higher rates because the 'migrants' consist of only ethnic minorities.

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| | | | |
|---|---|---|---|
| D8 | | **Denmark 1997** | Pakistan |
| Ethnicity/Nationality of head | | *Income Tax Survey* | Afghanistan |
| | | | Sri Lanka |
| | | | India |
| | | | Philippines |
| | | | Thailand |
| | | | Vietnam |
| | | | China |
| | | | South Korea |
| | | | Iraq |
| | | | Iran |
| | | | Syria |
| | | | Lebanon |
| | | | Jordan |
| | | | Somalia |
| | | | Ethiopia |
| N | | | Several African nationalities |
| Migrants | 513 | | Turkey |
| Ethnic minority migrants | 284 | | Bosnia-Herzegovina |
| | | | Croatia |
| Citizens | 12682 | | Yugoslavia |
| Total | 13158 | | Poland |
| | | | |
| D8 | | **France 1994** | Algeria |
| Ethnicity/Nationality of head | | *Family Budget Survey* | Tunisia |
| | | | Morocco |
| | | | Madagascar |
| | | | Mauritania |
| | | | Other African nationality |
| | | | Poland |
| N | | | Ex-Yugoslavia |
| Migrants | 622 | | Turkey |
| Ethnic minority migrants | 299 | | Cambodia |
| | | | Vietnam |
| Citizens | 10667 | | Laos |
| Total | 11298 | | Other Asian nationality |
| | | | |
| D8 | | **Germany 1994** | Migrant group arrived in period 1984–1993 (immigrant sample in GSOEP) |
| Ethnicity/Nationality of head | | *German Socio-Economic* Panel *(GSOEP)* | |
| N | | | |
| Migrants | 274 | | |
| Citizens | 5555 | | |
| Total | 5829 | | |
| | | | |
| D8 | | **Sweden 1995** | Bosnia-Herzegovina |
| Ethnicity/Nationality of head | | *Income Distribution Survey* | Bulgaria |
| | | | Greece |
| | | | Yugoslavia |
| | | | Croatia |
| | | | Macedonia |
| | | | Poland |
| N | | | Stateless |
| Migrants | 737 | | Turkey |
| Ethnic minority migrants | 330 | | Hungary |
| | | | Africa |
| Citizens | 15519 | | South and Central America |
| Total | 16265 | | Middle East |

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| | | | |
|---|---|---|---|
| D8 | | **United Kingdom 1994** | White |
| Ethnicity/race of head | | *Family Resources Survey* | Black-Caribbean |
| | | (covers households | Black-African |
| | | in Great Britain) | Black-other |
| | | | Pakistani |
| | | | Bangladeshi |
| N | | | Indian |
| Whites | 25308 | | Chinese |
| Ethnic minorities | 1081 | | Asian-other |
| Total | 26389 | | Other |
| | | | |
| D8 | | **United States** 1997 | Black, Hispanic, |
| Ethnicity/race of head | | *Current Population Survey* | Native American/Eskimo, |
| | | | Asian/Pacific Islander, White |
| Immigrant status of head | | | Migrant status: |
| N | | | Native born in the US, |
| Migrants | 3408 | | US territory, |
| Ethnic minority | | | foreign born to US parent |
| migrants | 2782 | | Naturalized citizen foreign born |
| Citizens | 46295 | | Non-citizen |
| Total | 50074 | | |

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