



**MATILDE**

Migration Impact Assessment to Enhance  
Integration and Local Development in  
European Rural and Mountain Regions

# REPORT ON CONCEPTUAL FRAMEWORKS ON MIGRATION PROCESSES AND LOCAL DEVELOPMENT IN RURAL AND MOUNTAIN AREAS



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### **DELIVERABLE 2.4 - Report on conceptual frameworks on migration processes and local development in rural and mountain areas**

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## LIST OF ACRONYMS

CAP – Common Agricultural Policy

CH – Switzerland

COVID 19 – Coronavirus disease 2019

EC – European Commission

EFTA – European Free Trade Association

ERDF – European Regional Development Fund

ESF – European Social Fund

EU – European Union

IS – Iceland

LI – Liechtenstein

MATILDE – Migration Impact Assessment to Enhance Integration and Local Development in European Rural and Mountain Regions

NO – Norway

OECD – Organisation for Economic Co-operation and Development

TCN – Third Country National

TFEU – Treaty on the Functioning of the European Union

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This report provides a conceptual framework for analysing migration processes of TCNs and the protagonists' interactions with local structures adopting a regional/territorial perspective. At first, working definitions for key categories, such as Third Country Nationals as well as rural and mountain areas, are given. Moreover, explanatory frameworks for immigration processes to rural and mountain areas are discussed, concluding with the new mobilities paradigm as an adequate concept to address both the local and regional variety of migration phenomena and related impacts, and processes of staying and attachment, commonly acknowledged as a prerequisite for evoking changes and impacts. Besides, migrants' interactions with places are pointed out, whilst agency of migrants is highlighted as crucial in this context, yet also migration governance represents an important pillar. This report also provides an overview about concepts on settlement of migrants and the individual's strife for participating in the economic, social, cultural and political life of the host society. It subsequently introduces the migration-development nexus, both in conceptual terms and its manifestation in current European rural development policies. Finally an outlook on the measurement of social, economic and territorial impact, to be further developed in WP3, WP4 and WP5, is given.

Regarding the focus of MATILDE, **TCNs** encompass non-EU Citizens and excludes nationals of NO, IS, LI and CH. TCNs encompass economic migrants, family migrants, students and researchers, highly skilled migrants, and forced migrants, i.e., asylum seekers, refugees and status holders and vulnerable groups (victims of trafficking, unaccompanied minors and stateless persons). For the definition of **rural and mountain areas**, the Rural-Urban typology, the Mountain typology, the Bordering Regions, the Functional Urban Areas and the CORINE Land Cover serve as a starting point, yet, in MATILDE, we aim to capture the complexity of rural areas by considering further indicators, inspired, for instance, by Thünen Typology of Rural Areas. Moreover, we see the necessity for place-based studies focusing on the micro-scale, especially when analysing sense-making process that often reflect itself in space-making activity.

Deriving from EU definitions of migrants, MATILDE focuses on TCNs as a broad category encompassing diverse groups whose boundaries are blurred and shifting, as emphasised by the notion of mixed migrations (van Hear et al. 2009). As migration motives and patterns are



increasingly diversified and prone to shift over time (Halfacree & Rivera 2012; Penninx & Garcés-Mascareñas 2016), the MATILDE project explicitly acknowledges the **fluidity of categorisations and legal statuses** of TCNs.

In light of the huge diversity of explaining concepts for migration processes, MATILDE also emphasises this **multi-causal nature of migration** and conceptualises international migration as a self-sustaining and self-propelling phenomenon (Massey et al. 1998). Rather than unidirectional flows, migration processes are conceptualised as **ongoing negotiations of mobility and immobility** (Halfacree & Rivera 2012), in which aspirations and abilities to migrate or to stay are addressed as crucial (Carling & Schewel 2017). Regarding this, characteristics and constellations on the individual level in interaction with the macro-level context play a major role.

Within MATILDE, we consider **place attachment processes** and resulting staying intentions as prerequisite for migrants' evoking long-term transformations and inducing sustainable impacts at rural and mountain places. We consider both, the affective dimension of place-based belonging, i.e. emotional ties that people develop with places of residence (place attachment, Lewicka 2010) and the functional dimension. The latter, termed place dependence, highlights the ability of a place and its physical characteristics to satisfy needs and aspirations (Scannell & Gifford 2014). We explicitly address multiple attachments, associated to translocal identities and belonging, since they may foster territorial/social exchanges and innovations often occurring within these circular movements of people and ideas.

Regarding the **interaction of the migrant subject with local and territorial structures**, MATILDE puts special emphasis on the agency of migrants, i.e. the individual's ability or power to act (Geiger 2016), by taking into account both their demographic, socio-economic and socio-cultural characteristics (Huddleston et al. 2013), as well as the role and functions of migrants' networks and organisations. Moreover, we describe general policies and spatial contexts as well as migration and integration policies (ibid.), which provide the structural basis for the development of agency.

Besides the individual perspective, MATILDE pays special attention to **migration governance**, and acknowledges soft policy instruments, political participation and increased cooperation by drawing on the new governance model. Simultaneously, multi-level governance is extended by

developing a renewed community method, operationalised in MATILDE as active and timely participation of various stakeholders at different levels (see also Stakeholder Involvement Plan D2.8). This goes in line with a local turn in migration governance.

With regard to **settlement of migrants**, in MATILDE, we address the multifarious interactions of migrants with local structures as valuable starting points to assess impacts. We take the mid-level theory of Ager and Strang (2008) as a starting point to structure the evaluation of migrant's impacts and simultaneously intend to show the complexity, i.e., interdependencies between realms of employment, housing, education and health, as well as social interactions and facilitators spatial mobility, language/cultural knowledge and safety/security.

Explaining concepts for interrelations of migration processes and development are described as **migration-development nexus**, whilst the specific role of rural development measures and instruments, based on place-based policy, is related to the second pillar of CAP, e.g. LEADER. For implications of immigration in a wider rural development approach, MATILDE considers the New Rural Paradigm, which emphasises competitiveness and, more important, the active participation of local people and simultaneously gives priority to local assets as development resources.

Author: Stefan Kordel

MATILDE aims to show how migration impacts local development and territorial cohesion, with a specific focus on European rural and mountain regions. As a crucial prerequisite for Work Package 3 (social impact assessment of migration), Work Package 4 (economic impact assessment of migration), and Work Package 5 (case studies), the conceptual framework, elaborated in D2.4, will set the ground for the assessment of the impact of TCNs. The aim is to develop a common understanding on the subjects and spatial contexts we are dealing with, and, more important, how we assume to explain immigration to rural and mountain areas. Therefore, D2.4 will

- Provide **working definitions** for MATILDE on key categories, such as Third Country Nationals as well as rural and mountain areas.
- Sketch **current concepts on migration**. For this purpose, the category “migrant” will be discussed broadly, and explaining concepts are elaborated, assuming the multi-causal nature of migration processes. The new mobilities paradigm, in particular, paves the way for a broader understanding of migration and enables MATILDE to consider the huge local and regional variety of migration phenomena and related impacts. A special emphasis will be put on the other side of the coin, i.e., place-based belonging, commonly addressed as a prerequisite for evoking changes and impacts. Finally, explaining concepts for the spatial distribution of migrants, i.e. spatial patterns, will be sketched.
- Present a state of the art of **migrants’ interactions with places** and the role of configurations of local structures in particular. Agency of migrants is highlighted as crucial in this context.
- Portray **migration governance**, i.e. what we commonly address as such, and especially stress its multi-level nature. By the example of integration of TCNs, governance as a multi-level and multi-dimensional process will be discussed, concluding with migration governance evaluation.

- Provide an overview about **concepts on settlement of migrants** and the individual's strife for participating in the economic, social, cultural and political life of the host society. Integration and inclusion/exclusion will be discussed and operationalised with the help of the mid-level theory of Ager and Strang (2008), which serves as a backbone for further analyses.
- Introduce the state of the art on the **interactions of migration and development**, commonly addressed as migration-development-nexus. For this purpose, the role of migration in current European rural development policies will be discussed.
- Finally give an **outlook on the measurement of social, economic and territorial impact**, to be developed in WP3, WP4 and WP5 by means of a state of the art on recorded impacts.

### 1.1 THIRD COUNTRY NATIONALS

Author: Stefan Kordel

The project considers “Third Country Nationals” (TCNs) as non-EU citizens, who reside legally in the European Union and who are the target of EU integration policies (see EU Integration Action Plan of Third-Country Nationals, June 2016). A TCN is “any person who is not a citizen of the European Union within the meaning of Art. 20(1) of TFEU and who is not a person enjoying the European Union right to free movement, as defined in Art. 2(5) of the Regulation (EU) 2016/399 (Schengen Borders Code).” (European Commission 2020a). According to this definition, nationals of NO, IS, LI and CH are not considered to be Third Country Nationals. For the MATILDE country Turkey, Turkish nationals are also not considered (see also country report on Turkey in Deliverable 2.1). TCNs cover economic migrants, family migrants, students and researchers, highly skilled migrants, and forced migrants, i.e., asylum seekers, refugees and status holders and vulnerable groups.

In line with MATILDE’s focus on rural and mountain areas, the project devotes specific attention to groups of TCNs whose impact in such areas may be more significant. It thus centres in particular on **economic migrants, family migrants and forced migrants (including asylum seekers, refugees and status holders)**. Specific subgroups, such as minors, unaccompanied minors, disabled people, elderly, pregnant women, single parents with minor children, victims of trafficking in human beings, persons with serious illnesses, persons with mental disorders and persons who have been subject to torture, rape or other serious forms of psychological, physical or sexual violence, such as victims of female genital mutilation will be considered in some local cases studies, where their presence is significant. The same holds true for TCNs, who live illegally in the EU.

## 1.2 RURAL AND MOUNTAIN AREAS

Author: Marzia Bona

In the preliminary phase of the project, MATILDE regions have been described and categorised according to their territorial features (see Deliverable 2.1). As the selection of a single indicator at this preliminary stage was necessary to conduct a quantitative analysis, **Eurostat's Urban-Rural typology was used to categorise this dimension**, thus giving emphasis to population density as a basis for distinguishing more or less rural areas. This preliminary approach to the territorial characteristics of MATILDE regions led to their **classification into two groups of regions: “more rural” and “less rural”**. The first group considers the regions characterised as “predominantly rural” in relation to the Eurostat's Rural-Urban Topology. “Less rural” includes regions defined as “intermediate” and “predominantly urban” in line with the Eurostat's Urban-Rural Typology.

However, to examine the specificities of rural and mountain areas, a broader set of aspects should be taken into account. One cannot speak of rural and mountain regions without taking into account issues beyond population density and distribution. Dimensions such as specific settlement patterns and structures, land use, accessibility of services and the distribution and access to resources of different kind (employment, housing, education, etc.), are just some of the factors that need to be considered. To this end, different typologies elaborated by Eurostat have been taken into account in Deliverable 2.2, the database that collected preliminary data on MATILDE regions and that represents the basis for the forthcoming assessment of the territorial characteristics that matter at the time of assessing the impact of TCNs on MATILDE regions.

In order to provide a more complete profile of these regions, the examination of the social, economic and territorial impacts of TCNs in MATILDE regions will also be based on additional dimensions to describe the territorial aspects of these regions. Indicators that are already part of MATILDE database include, in particular the **Rural-Urban Typology**, the **Mountain Typology**, the **Bordering Regions**, the **Functional Urban Areas** and the **CORINE Land Cover** (Eurostat 2019; see also Table 1).

Indicators	Description & Relevance
<b>Typology of space</b>	
Rural-Urban Typology	Indicates the share of the population living outside urban areas. Identifies rural contexts within the project area.
Mountain Typology	Indicates the share of the population living in mountain areas and the share of territory covered by mountains.
Bordering Regions	Identifies regions that have population within 25 km of a land border.
Functional Urban Areas (FUA)	Consists of a densely inhabited city and of a less densely populated surrounding area (commuting zone)
<b>Land Use</b>	
CORINE Land Cover	Indicates the share of territory covered by agricultural fields. Inventory of land cover in classes (agriculture areas, artificial surface such industrial areas and settlements).

**Table 1: Physical and geographical dimension**

*Source: Membretti 2020a: 56*

In order to meet criticism on lacking complexity in terms of categorizing rural areas, Küpper (2016) developed the **Thünen-Classification of Rural Areas** for Germany. This typology firstly attempts to measure the degree of rurality based on an index and, secondly, relates this to socio-economic characteristics of an area. The index of rurality encompasses population density, share of one- and two- family houses, share of agriculture and forestry, inhabitants in the catchment area, distance to major centres, whilst the index on socio-economic conditions includes average unemployment rate, average gross wages, median income, average local taxable capacity, average net migration of 18-to 29-year olds, vacancies, average life expectancy of women, average life expectancy of men, average rate of school dropouts. The classification of regions at NUTS3 level in Germany distinguishes among 4 types of rural regions:



- very rural / good socio-economic conditions,
- very rural / less good socio-economic conditions,
- fairly rural / good socio-economic conditions,
- fairly rural / less good socio-economic conditions.

The multiple aspects considered in the MATILDE database, as well as the bifocal perspective incorporated in the Thünen typology, indicate the need to conceive **territorial characteristics as a continuum**, which cannot be addressed simply as rural versus non-rural, or as mountain versus non-mountain. A variety of different aspects contribute to determine the specific conditions of each region. Hence, on the one hand, there is the need to broaden the scope of the indicators and dimensions taken into account to characterise these regions. On the other hand, the preliminary data collection for Deliverable 2.1 also highlighted the need to identify the most appropriate scale.

While the regions have been analysed and categorised at NUTS3 level in these preliminary tasks, the MATILDE project aims to adopt a local scale, digging at micro level to consider the multiple forms of interaction and specific processes that characterise these territories and influence the opportunity for TCNs to interact with the local context. Work packages 3 and 4 will lay the foundations of this process by integrating the indicators considered so far with further quantitative and qualitative data, with the aim of providing a more complete description and analysis of these territories. Work Package 5 will dig deeper to consider local characteristics and interactions at micro level, adopting research-action methods to fully capture the multidimensional processes that frame and condition the impact of TCNs on these regions.

### 1.3 TERRITORY

Authors: Andrea Membretti and Ingrid Machold

In the context of MATILDE, territory<sup>1</sup> refers to the complex interdependencies of a certain physical environment and the room to manoeuvre and opportunities for social actors. Moving from the assumption that “social facts” (Durkheim 1895) are formed in space (Bagnasco 1999), we define territory first of all as a “practiced space” (de Certeau 1990) in which social facts take shape. Labour market, housing, infrastructures etc. in a certain environment are hereby not only necessary framework conditions (Hradil 2003); they rather have a considerable effect on the ability of social actors to act, their access to resources and power relations.

Considering the role of social actors in producing and re-producing their physical and socio-cultural environment (the “social construction of reality”, as defined by Blumer 1969), territory can be represented as an area delimited in relation to an active system of relationships and interactions (Osti 2010), involving different actors at different scales. These social actors (individuals, organisations, institutions, movements, etc.) are involved in processes of “enactment” (Weick 1995), while they bring structures and events into existence and set them in action through **sense-making process that often reflects itself in space-making activity** (Membretti 2003). Therefore, territories as spaces are the result of the constitutional process producing the “relational order of social goods and living beings in places” (Löw 2001: 212, own translation).

Within MATILDE, therefore, the objects of territorial analysis are not buildings, rural or urban areas, artefacts, neighbourhoods, villages or cities as such; rather, the object of the study is the complexity of relations and interactions that connect all these elements - physical, cultural, social - within systems whose boundaries (more or less permeable) are what separates and at the same time relates (as fences and bridges) socio-spatial aggregates with different levels of social density (in terms of internal cohesion, centripetal and centrifugal trends, power relations, etc.).

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<sup>1</sup> We acknowledge the large body of literature in social sciences emerged throughout the spatial turn and debates on human geography on space and place (e.g. Relph 1976; Tuan 1977; Massey 1992; Cresswell 2004) as well as elaborations referring to rural space in particular (Halfacree 2006; Woods 2011).

Physical space becomes a social phenomenon, acquiring the characteristics of the territory, once it begins to be used by communities, setting boundaries, assigning cultural meanings, guaranteeing rights and duties of use and ownership, exercising forms of control and government over it, as well as naturally manifesting possible conflicts or negotiations about it. In this sense, territory can be seen as a **mechanism of interaction between society and its environment**.

Therefore, **territory is a system of relationships and interactions** (social, economic, administrative, political, etc.) **linked to a physical base**, consisting of land, infrastructure, building heritage, etc. On the broader basis represented by the territory, but on a smaller scale, it is possible to develop sense of belonging and socio-spatial ties that can perimeter and define places (in the anthropological meaning of the term), i.e. portions of space lived and practiced intensely by different territorial communities, which develop collective identities on them.

### 2.1 CONCEPTUAL PRESUPPOSITIONS ON MIGRATION AND PLACE ATTACHMENT

Authors: Stefan Kordel and Tobias Weidinger

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#### DEFINITION AND CHALLENGES

Migration scholars and international organizations made several attempts to define migration processes and its protagonists. Widely acknowledged as a form of spatial mobility that implies a **change of one's usual place of residence** “whether within a country or across an international border, temporarily or permanently, and for a variety of reasons” (IOM 2020a), migration is usually distinguished from other forms of spatial mobility, such as weekly or seasonally commuting. Changing a place of residence often implies a re-negotiation of social spheres of interaction, especially movements for long distances, e.g. international migration. Moreover, a statistical argument, i.e., the opportunity to collect data on migration, was urged by the United Nations Department of Economic and Social Affairs (UN DESA) in favour of the criterion of changing a country of usual residence. In order to differentiate temporally, the UN defined short-term migration with a change of residence for less and long-term with more than one year (UN 1998: 18). To grasp the specific constellations within the European Union, the EC defines a migrant, in the EU/EFTA context, as a person who “establishes their usual residence in the territory of an EU/EFTA Member State for a period that is, or is expected to be, of at least 12 months, having previously been usually resident in another EU/EFTA Member State or a third country” (European Commission 2020b).

Such definitions are predominantly serving statistical and administrative purposes, however are frequently not able to capture today's complexity of migration processes. Alongside globalisation processes and access to means of physical and virtual mobility, **multiple residences and multi-local forms of living** often replace one single main place of residence. Protagonists with certain patterns of absence and presence at a place encompass, for instance, working migrants, lifestyle movers in retirement age or families in general. They all orient their everyday lives and their

biographies on multiple points of reference (Pries 2010, see also transnational migration in the following chapter).

Politically relevant and important for planning infrastructures of welfare provision is the **legal status of migrants**, sometimes eponymous for the migration process itself. The legal status determines what kind of social welfare they are entitled to receive, to what extent they can access the employment market and how they are able to politically participate in receiving societies. Whilst protagonists of working and family migration enter the EU territory by means of previously issued visa, forced migrants<sup>2</sup> acquire the right to enter the EU based on humanitarian issues.

MATILDE focuses on TCNs as a broad category encompassing diverse groups whose boundaries are blurred and shifting, as emphasized by the notion of mixed migrations (van Hear et al. 2009). As migration motives and patterns are increasingly diversified and prone to shift over time (Halfacree & Rivera 2012; Penninx & Garcés-Mascareñas 2016), the project acknowledges the fluidity of categorizations and legal statuses of TCNs.

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## MULTIPLE MOBILITIES: OVERVIEW ABOUT EXPLAINING CONCEPTS

Migration studies recently described human mobility in terms of temporal and spatial characteristics, whether the movement was involuntary or voluntary, socio-demographic and socio-economic profile of protagonists, or their motivations (Wehrhahn & Sandner le Gall 2016). Especially the latter were explained either by deterministic models (push-pull theory, addressing socio-economic situations in sending and receiving contexts, cf. Lee 1966), behaviourist concepts, where individuals evaluate objective aspects, as well as constraints theories, which consider both structures and individuals' needs. Factors evoking migration processes, e.g. economic, cultural

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<sup>2</sup> In migration sociology, forced migration was recently established and refers to global social relationships and associated consequences (Castles 2003, cit. after Scherr & Inan 2017). According to EMN Glossary, forced migration is “a migratory movement in which an element of coercion exists, including threats to life and livelihood, whether arising from natural or man-made causes (e.g. movements of refugees and internally displaced persons as well as people displaced by natural or environmental disasters, chemical or nuclear disasters, famine or development projects)” (European Commission 2020c).

and political issues, cannot be addressed isolated from each other, but are rather as a bundle of reasons (Hillmann 2016). The theory of cumulative causation emphasises this **multicausal nature of migration** and conceptualises international migration as a self-sustaining and self-propelling phenomenon (Massey et al. 1998, cf. chapter on spatial patterns). Recent debates on transnational migration, resulting in transnational connections and social spaces (Glick Schiller et al. 1995; Pries 2008) and multifarious place-based belongings (Lam & Yeoh 2004), as well as circular migration and remigration challenge unidirectional flows with a certain start and final end. Instead, what is often addressed as “post-migration lives” may serve as the context prior to the next migration step (see also “secondary migration”, e.g. Robinson & Hale 1989; Nielsen 2004; Moret et al. 2005; European Parliament 2017; and “onward migration/mobility”, e.g. Lindley & van Hear 2007; Stewart 2011; Sim 2015; Weidinger et al. 2017, Kordel & Weidinger 2019).

Besides, the **new mobilities paradigm** (Sheller & Urry 2006) strongly affected scientific debates on migration, assuming to take mobility as the “normal”. As a consequence, we must not consider migration as one single act, but acknowledge ongoing negotiations of mobility and immobility (Halfacree & Rivera 2012). Moreover, the new mobilities paradigm suggests a broader view on mobility, as migration processes only constitute a relatively small part of spatial movements and blurring boundaries between residential mobilities and habitual/everyday mobilities are observable. For rural areas, Milbourne & Kitchen (2014) introduced the term **rural mobilities** encompassing “movements into, out of, within and through rural places; (...) linear flows between particular locations and more complex spatial patterns of movement (...) journeys of necessity and choice; economic and life-style based movements; hyper- and im-mobilities” (ibid: 385-386). Addressing the latter aspect, in the 1990s, Bauman (1998) already highlighted a nexus between mobility and immobility, referring to the fact that mobility for some can create immobility for others (Sheller & Urry 2006), while current debates also stress unmarked categories of migration, e.g. consider staying as an active process and deliberate act (cf. rural staying, Stockdale & Haartsen 2018). Accordingly, Carling (2002) developed an **aspiration/(cap)ability model** that considers migration the result of a two-step approach, i.e. aspiration as a conviction that migration is preferable to staying or non-migrating and the ability to migrate (Chart 1). Both aspiration and ability are determined by characteristics and constellations on the individual level

in interaction with the macro-level context, i.e. the emigration environment and the immigration interface. The further encompasses the social, economic and political context in which migration is socially constructed, while the latter comprises migration policies and regulations that predetermine possible modes of migrating and are associated with a specific set of barriers and requirements (Carling & Schewel 2017).

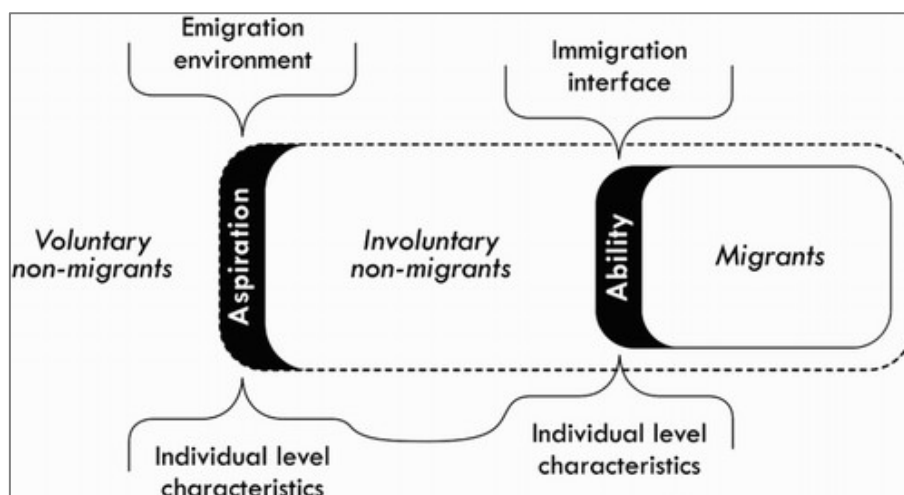


Chart 1: The aspiration/(cap)ability model

Source: Carling & Schewel 2017: 946

The change of perspective by placing “being mobile” at the core, however, is inherently interrelated to processes of fixity on a temporary basis (Bell & Osti 2010; Kordel 2017). Accordingly, Urry (2003) stated a “dialectic of movements and moorings” (ibid.). Individuals and groups stay at a certain place after or before being mobile and establish various relations with places and people. According to Massey (1992), places are re-negotiated and remain unfinished. When mobile individuals establish place attachments and belongings at various places (transnational social spaces, Glick Schiller et al. 1995; Faist et al. 2013), localities play an important role (Brickell & Datta 2011). In light of most recent transformations evoked by the Covid-19 pandemic, negotiations of mobility and immobility and, as a result, “compulsion to locality” (Membretti 2020b) have come to the fore. Following the new mobilities paradigm, sedentariness could be re-evaluated and a different compulsion to locality could be affirmed and required – also associated to a revival of the rural, as proved for many other events of crisis in history.



As migration theory mostly focuses on what makes people move instead of what makes them stay, migration scholars recently focused on social networks in transnational migration processes, but have sparsely addressed meanings of places (except, e.g. Boccagni 2017). In cases when spatial context where addressed, research emphasized on ties of migrants in their contexts of origin than in contexts of arrival. Accordingly, Lynnebacke (2020) suggests to put more emphasis on attachments to places and place-based belongings.

Whilst the terms “place-based-belonging”, understood as a personal feeling of being at home in a place (Yuval-Davis 2006) and **“place attachment”**, i.e., “emotional ties that people develop with their places of residence... [and] places visited for recreational purposes” (Lewicka 2010: 35-36), mostly focus on affective notions, **“place dependence”** refers to the characteristics of places. Place dependence describes “the ability of a place to satisfy needs and goals, or the extent to which the physical characteristics of the place provide the appropriate resources for one’s preferred activities” (Scannell & Gifford 2014: 275).

According to Lewicka (2011), length of stay and local community ties are predictors for place attachment, whilst physical factors may influence place attachment indirectly as they represent facilitators for social contacts. Moreover, **development of place attachment is addressed as a process**, in which exposure and increased familiarity is important. Goffman (1974), in addition, highlighted that the concrete possibility of acting in a specific environment, modifying it, and being recognised by others as a local actor (mutual recognition) is a prerequisite. Attachments become stronger once people experience biographical life events at places and ascribe meanings to places. Social interactions especially become important, since immigrants, as novel actors, start to become involved in the negotiation processes of meanings or the use of rural places. Consequently, negotiations between old and new inhabitants, but also along lines of socio-demographic, socio-economic and socio-cultural characteristics, result in both transformations and persistence of rural places (Membretti & Viazzo 2017).

Within MATILDE, we consider place attachment processes and resulting staying intentions as prerequisite for migrants’ evoking long-term transformations and inducing sustainable impacts

at rural and mountain places. We address multiple attachments, associated with translocal identities and belonging, since they may foster territorial/social exchanges and innovations often occurring within these circular movements of people and ideas. In light of long-lasting processes of hyper-mobility, we consider, as a consequence of Covid-19 pandemic, an emerging tendency to a new “compulsion to locality” (Membretti 2020b, cf. “compulsion to mobility” and “compulsion for proximity”, Urry 2002). The latter is affecting in particular migrants, forced to remain in their countries of origin or at risk of ghettoisation in European regions, due to the lock-down measures, which are particularly affecting them.

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## SPATIAL PATTERNS

How can spatial patterns of concentration of migrants at places within the EU, its member states and regions be explained? Inspired by neoclassical economics, the new economics of migration, world systems theory, and social capital theory (Jennissen 2004), **migration system theory** takes push factors at places of origin and pull factors such as good employment opportunities at destinations as starting point and highlights the links between both by shared community ties (Greenwood 1997; van Tubergen et al. 2004). Such systems are characterized by relatively intense exchanges of goods, capital, and people between certain countries and less intense exchanges between others, whilst countries are assigned as sending or receiving migrants (Fawcett 1989; Zlotnik 1992). Whilst this theory can explain immigration flows on macro level and for labour-related migration processes, it lacks explanatory potential for regional and local patterns.

Sociological migration theories, instead, address the meso-level and focus on the role of **social relations and networks**, not only with regard to the decision to move, but also with regard to the choice of destination. If potential migrants can access social capital at the destination, risks and costs of migration can be lowered and gains of migration be increased (Massey et al. 1998). In the long run, potential migrants can follow network members who have already migrated more easily and thus facilitate “chain migration” to a destination (Choldin 1973). At a certain point, however, networks may become saturated (Massey et al. 1998). Apart from networks to people, also networks to places, i.e. place attachments, may be important drivers to initiate and sustain migration processes to certain areas, e.g. when people in (pre)retirement move to tourist

destinations they regularly visited and got acquainted to during their working lives. As migration “grows alongside tourism” (Brown et al. 2011), Brown et al. spoke of a **“path dependency” of regions** (cf. Rodríguez-Pose & von Berlepsch 2020). To sum up, beyond economic issues, networks and past migration to a destination may also represent long-lasting reasons to move to a certain area.

Besides such migration prone regions, **New Immigration Destinations** (NIDs), i.e., relatively novel destinations for immigration that are characterised by a rapid change of (ethnic) diversity rather than by a large number of newcomers and whose administration are challenged by questions of integration, lacking specific infrastructure and services (Winders 2014; McAreavey 2018) recently came to the fore. Thereby, dispersal mechanisms, e.g. applied for humanitarian migrants, and recruitment agreements that mandatorily locate immigrants in a certain region for a certain amount of time play an important role in explaining the emergence of NIDs.

Within MATILDE, we consider general policies and spatial contexts<sup>3</sup> in the past, previous migration processes and migration and integration policies<sup>4</sup> as they have an impact on current immigration of TCNs and their spatial distribution, e.g., most prominent, dispersal policies of asylum seekers. Thereby, in diachronic terms, the immigration of TCNs and associated impacts will be considered from 1990s until present. In particular, e.g. former refugees from former Yugoslavia, Afghanistan and Iraq as well as immigrants from Albania or Turkey will be addressed in MATILDE case studies as they represent numerically relevant nationals with a long-term presence in certain EU countries (see also D2.1).

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<sup>3</sup> General policies and context may encompass labour market structures and economic growth, the education system, the welfare system, the housing market and public opinion (Huddleston et al. 2013: 18). In addition, we take into account the role of physical space on migration flows and the spatial distribution of TCNs.

<sup>4</sup> Migration policies regulate the inflow of immigrants and the channels to be used, while integration policies (labour market policies, education policies, social policies and naturalization policies) address the situation of immigrants after they have settled in the country (Huddleston et al. 2013: 22).

## 2.2 THE MIGRANT SUBJECT AND INTERACTIONS WITH (LOCAL) STRUCTURES

Authors: Stefan Kordel and Tobias Weidinger

Migrants interact with places in manifold ways. Configurations of local structures, places and people determine the extent and quality of such interactions and may result either in processes of exclusion or inclusion in terms of access to housing, education, employment, health(care) (Ager & Strang 2008), social security or political participation (see chapter 3 on settlement of migrants). Migrants experience exclusion and inclusion at the same time and make use of experiences, accumulated over time, in order to gain knowledge about places and their accessibility (Madanipour 1998; Cass et al. 2004). Positive representations and practices associated to places foster the development of place-based belonging (Radford 2017). The charged relationship of the individual and structural spatial contexts will be captured by means of the term **agency**<sup>5</sup>.

Integrating structural theory with action and subject theories (Scherr 2012), agency describes individual's ability or power to act (Geiger 2016), despite of influencing structures. One should avoid an idealised perspective on the subject as autonomously and rationally acting subject. Instead, the individual is constantly striving for personal advantages (calculating subject), whilst acting is also embedded in contexts (contextual subject, Halfacree & Rivera 2012). Emirbayer & Mische (1998) point towards a temporal dimension of agency, suggesting that it is a “temporally embedded process of social engagement, informed by the past (in its ‘iterational’ or habitual aspect) but also oriented toward the future (as a ‘projective’ capacity to imagine alternative possibilities) and toward the present (as a ‘practical-evaluative’ capacity to contextualise past habits and future projects within the contingencies of the moment)” (ibid.: 963).

Due to the diversity of TCNs, the amount of agency to manoeuvre through everyday life varies in time. When starting to migrate, and for some TCNs also during the migration trajectory, migrants stop to accept passivity (Innes 2016) and make use of agency. In migrant's everyday lives, agency is developed in various realms, e.g. when improving one's housing conditions, when participating

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<sup>5</sup> The agency of migrants has a spatial dimension, when considering the concept of “enactment” (Weick 1969).

in leisure activities or when upgrading one's education. Social contacts can be crucial for the development of agency, since migrants especially learn how to deal with local structures through social bridges. Feedback effects of migrant's agency are associated to the negotiation processes and the social construction of space/place (Woods 2018) and knowledge transfer to other migrants. This can be institutionalised by migrant organisations.

MATILDE puts special emphasis on the agency of migrants, by taking into account both their demographic (gender, age, family status, citizenship, country of birth, country of birth of parents, length of residence, age of arrival), socio-economic (education, employment, income, occupation, level of development of country of origin) and socio-cultural factors (mother tongue, language acquisition) characteristics (Huddleston et al. 2013), as well as the role and functions of migrants' networks and organisations. Moreover, we consider general policies and spatial contexts, but also migration and integration policies (ibid.), which provide the structural basis for the development of agency. In addition, agency is enhanced through participatory processes of action research envisaged within WP5.

## 2.3 MIGRATION GOVERNANCE

Author: Marika Gruber

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### CONCEPTUALISING GOVERNANCE

Since recent years, "governance" (from the Latin term "*gubernare*") has become a central element in the political and scientific discourse and means the way in which political decisions are made and implemented. Hence, governance refers to activities ("to govern"), processes ("governing") and coordination mechanisms ("governance") of political regulation and steering. The increasingly complex society (e.g. globalisation, Europeanisation, neo-liberal market approaches, technological changes and digitalisation) has led to major challenges for political governance and a questioning of traditional forms of political decision-making, which resulted in the evolvement of the "governance" concept (Wirtschaftsuniversität Wien 2018a). The

Europeanisation and globalisation led to an extension of the governance theory (see Table 2), as e.g. the concentration on a single nation state was no longer sufficient and appropriate.

Basic paradigm	Policy development (by government) + policy implementation (by public agencies)
First extension	Include bottom-up perspective: sectoral structure and target group behaviour
Second extension	Include policy development and implementation in public/private networks and self-regulation societal systems
Third extensions	Include effect of European policy upon domestic sectoral structures and policy making
Fourth extension	Include European level of policy making
Fifth extension	Include political input processes at European and national level

**Table 2: The governance paradigm and its extension**

*Source: Mayntz 2003: 30*

Although the European Union has a unifying roof for its member states, it is not a federal state and a familiarly federal state governance does not apply (Mayntz 2003). Mayntz describes the European Union as obviously more than a regime. Apart from its function as a negotiating area, it can be best defined as a “complex multi-level system” (ibid.: 32). Globalisation with its expanding communication, including the transport and exchange of information, the growing (personal) mobility and migration challenges, as well as the emergence of globalised markets show that social groups become more and more independent of geographical locations and evokes the need for a **transnational governance**, which is different from European integration. The globalisation goes hand in hand with the co-existence of different types of processes and government modes as well as i.a. international organisations, multinational cooperation, transnational associations and interest groups, and individual actors (like “stateless”, but still transnationally connected migrants) without clear geographical reference. The structurally diffuse context caused by globalisation leads to e.g. changes, which cannot be attributed to specific identifiable actors’ behaviour (Mayntz 2003). Further, the loss of trust in political

institutions and a growing disenchantment with politics among citizens raised the question of new governance concepts apart from the existing government models and its traditional forms of political decision-making (“government”), which are mainly characterized by legal regulations (“command-and-control”) and a hierarchical (“top-down”) decision-making processes (Wirtschaftsuniversität Wien 2018a).

The distinction between governance and government sometimes gets blurred and the role that “government” plays in the concept of “governance” is seen differently by researchers as Anne Mette Kjær (Katsamunska 2016). According to her, “governance is the capacity of government to make and implement policy, in other words, to steer society” (2004: 10-11, cited after Katsamunska 2016: 133). The government’s role in governance is variable and depends on whether a state-centric model or a more society-centred model of governance is taken as a basis (Katsamunska 2016). Nevertheless, three important elements characterise the “**new governance model**” (Wirtschaftsuniversität Wien 2018a):

- Use of “soft policy instruments” rather than “command-and-control” regulations: e.g. taxes, voluntary agreements or the dissemination of information.
- Political participation: involvement of different social actors in the development and implementation of policies (stronger role of social actors and their relationship to political institutions, i.e. “network governance”).
- Increased cooperation between different policy levels: all political levels (i.e. the European, national, regional and local levels) are important for the development and implementation of policy decisions and have important roles and responsibilities (“multi-level governance” approach).

To tackle current needs of governance caused by transnationalisation and globalisation, according to Mayntz (2003), it would be necessary to “include all modes of social ordering, all the different types of actor configurations beyond hierarchies and networks, their combinations and in particular their interaction” (ibid.: 36). This governance mode would create a “theory of social dynamics” (ibid.: 37).



In its original understanding, multi-level governance (also known as “vertical policy integration”) aimed to “capture and understand political processes related to the emergence of supranational institutions such as the European Union and to facilitate analysis of decentralised decision-making processes, in which sub-national level governments and civil society have come to have increasing influence” (Saito-Jensen 2015: 2). The term “multi-level” specifically refers to multiple actors involved in the governance process i.e. both state (governmental) and non-state (non-governmental) actors, that are located at both local (sub-national), national and global (supranational) level (ibid.). In a multi-level governance model, state power and control is displaced in a threefold way (Termeer et al. 2010; Daniell & Kay 2017):

- upwards to supranational actors,
- downwards to sub-national (regional and local level) actors, and
- outwards to civil society and non-state actors.

The need for a multi-level governance arose for two reasons: firstly, it was assumed that one central political level could not execute all tasks. Secondly, it became obvious that different political levels (global, European, national, regional, local) have different competences and expertise, which can serve as an advantage in problem solving. One aim of multi-level governance is a better cooperation and coordination between the political levels to achieve better integration of the various policy fields (Wirtschaftsuniversität Wien 2018b).

Whilst the cooperation of the political levels is a precondition for achieving an effective vertical integration of policy areas (Wirtschaftsuniversität Wien 2018b), the alignment of the different government levels to define common goals for specific policy areas remains a big challenge (Saito-Jensen 2015). In addition, not all relevant actors of those political levels which are directly affected by the policy impacts (like local levels in migration and urban/rural development issues) can or do participate (ibid.). However, the identification and participation of important influential stakeholders in the specific field to establish trust communication routines as well as cooperation practices and commitment within the governance network is considered crucial for successful multi-level governance (European Commission 2015).

Already in 2001, the European Commission published a White paper on “European Governance” [COM (2001) 428 final; 2001/C 287/01] as it became obvious that on the one hand many European citizens expect solutions to problems challenging the societies they live in, and on the other hand they lost trust in institutions and politics as well as in poorly understood and complex systems like the European Union. These developments prompted the European Commission to define the reform of European governance as one its strategic objectives in early 2000. The White paper formulated proposals of changes as to “renew the Community method by following a less top-down approach and complementing its policy tools more effectively with non-legislative instruments” (2001/C 287: 3). The paper also addresses five principles of “good governance” (normative expectations on governance; Schultze 2011), which should help to implement a more democratic governance at all levels, from global to local: “openness, participation, accountability, effectiveness and coherence” (2001/C 287: 7). An opening-up of the policy-making process was proposed so that more people and organisations get involved in the shaping of EU policies. Apart from the involvement of individual citizens, awareness for the voice of the civil society (e.g. churches, religious communities or unions and employers’ organisations), and special attention for the collaboration with networks and network-led initiatives, the White paper proposed that the “Commission should ensure that regional and local knowledge and conditions are taken into account when developing policy proposals. For this purpose, it should organise a systematic dialogue with European and national associations of regional and local government” (2001/C 287: 10). Finally, the White paper proposed a **“renewed Community method”**: “Commission proposes and executes policy, the Council and the European Parliament take decisions, and national and regional actors are involved in the EU policy process” (2001/C 287: 29). Mayntz (2003) describes this development as a new, co-operative mode of governing, “where state and non-state actors participate in mixed public/private networks” (ibid.: 27). Accordingly, the MATILDE project draws special attention to the active and timely participation of various stakeholders at different levels (European, national, regional, provincial and local) (MATILDE Grant Agreement, Nr. 870831). The concepts of civic engagement and stakeholder identification as well as methods of their participation are laid down in the Stakeholder Involvement Plan (D2.8).

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## MULTI-LEVEL MIGRATION GOVERNANCE: INTEGRATION OF THIRD-COUNTRY NATIONALS AS A MULTI-LEVEL AND MULTI-DIMENSIONAL PROCESS

Following Geddes et al. (2019), migration governance is an organisational process. Accordingly, the first goal of the analysis is to conceptualise the effects of change that cause international migration (like economic, political, social, demographic or environmental ones, see also section 2.1). The second goal, instead, is to analyse how the effects of migration are steered, managed and coordinated.

A previous analysis of the multi-level structure of migration governance carried out by Scholten and Penninx (2016) found an increasing dispersal of migration and integration policies over the different government levels. While nation states have handed over power to the European Union (e.g. in immigration regulations, especially to develop a Common European Asylum System), resulting in a **Europeanisation of migration governance**<sup>6</sup>, in **integration policy making**, a “**local turn**” can be noticed instead. While, traditionally, migrant integration was considered as a national government task, as nation states have specific ideas about how migrants should integrate, due to the need for a pragmatic problem-solving<sup>7</sup>, integration policies evolved on local level (in particular bigger cities) before national integration policies were developed (Scholten & Penninx 2016). Hence, also local actors have to coordinate with other political levels (regional, national, European) as well as a broad variety of actors. Therefore, they play a key role in the integration process (Gruber 2013; OECD 2018). But it can be observed for some municipalities that the “local turn” led to a decoupling of national and local policies (e.g. different objectives are pursued). While migrant integration policies have become more complex between local, regional, national, and EU level, a “common integration agenda” is still missing (Scholten & Penninx 2016).

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<sup>6</sup> As regions and their various stakeholders interact with other political levels (local, national, European) to shape the migration governance process, Geddes et. al. (2019), finally speak of a **regionalisation of migration governance**.

<sup>7</sup> Local authorities and actors take on a double role in migration and integration governance: First, implementation of national legislation, and, second, answering local demands also by initiating new policies (Zincone & Caponio 2006).

Migrants can play a vital role in regional and local development (see also chapter 4). Their contribution, however, depends on their effective integration, which is framed by the quality of integration policies, as well as other national and regional policies like economic development strategies (Huddleston et al. 2013; OECD 2018, see also chapter 3). Hence, migration governance, integration governance and regional/rural governance (Pollermann et al. 2014) are interdependent and influence each other. To sum up, migration processes (directions, distances, durations, reasons and types) have social, economic and territorial impacts, which addresses various governance levels (Geddes et al. 2019). It is therefore appropriate to speak of “multi-level migration governance”.

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## MIGRATION GOVERNANCE EVALUATION

For the assessment of migration governance<sup>8</sup> and to define what “well-managed migration policy” might look like, the International Organization of Migration (IOM) developed a Migration Governance Framework (MiGOF) in 2015. The Migration Governance Indicators (MGI) help to assess national frameworks (IOM 2020b). On the opposite, the Migrant Integration Policy Index (MIPEX) measures and monitor EU member states’ policies to integrate migrants.

MATILDE considers how the shift in integration programs from the national to the local levels, and from society to individuals, may result in marketisation, privatisation, fragmentation and ‘NGO-isation’ of services related to integration policies (O’Neill 2001). Policy analysis conducted will consider how different decentralised governance environments (Brodkin 2011) influence how policies are delivered at the local level (Lipsky 1980; Brodkin 2013).

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<sup>8</sup> The migration governance across macro (transnational, national), meso (sub-national/local) and micro-levels (migrants/refugees), e.g. in terms of integration policies, is analysed by the H2020 project RESPOND (program H2020-EU.3.6.1.3., topic ENG-GLOBALLY-03-201).

### 3. SETTLEMENT OF MIGRANTS

Authors: Tobias Weidinger and Stefan Kordel

Ever since having arrived and becoming settled at a rural or mountainous place of residence, migrants start to interact with various realms of the local society. To encourage such interactions, various stakeholders, including migrants themselves, initiate measures that intend to foster inclusion and participation, mostly known as the integration process.

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#### INTEGRATION AND INCLUSION: AN OVERVIEW

In general terms, integration means a continuous process for achieving social cohesion in a society, where newcomers characterize population development. Widely acknowledged is the term integration as a multidimensional, non-linear set of interdependent processes through which new population groups are included, according to different gradients, into the existing systems of socio-economic, legal and cultural relations (Penninx & Garcés-Mascreñas 2016). Integration is, firstly, rather addressed as process than as state whilst, secondly, the society as a whole is involved in this process (Schammann & Gluns 2020, *forthcoming*), or, as Berry puts it (1997), integration is a “two-way process”. Similarly, the Common Basic Principles (CBP) on integration adopted by the EU Justice and Home Affairs Council in 2004 (reaffirmed in 2014) refer to integration as a “dynamic, two-way process of mutual accommodation by all immigrants and residents of Member States” (EPC/KBF 2005: 4). Whilst immigrants should “exercise their rights and responsibilities in relation to their new country of residence” (Huddleston et al. 2013: 71), the receiving societies should explicitly be encouraged to increase their understanding of migrants’ contributions, and their acceptance of diverse cultures and religions (Cooke & Spencer 2006).

While migrant integration can be measured by long-term convergence across a wide range of common social indicators (Huddleston et al. 2013), processes of **social exclusion and inclusion** of migrants continue to occur over time. Thereby, social exclusion is considered a situation whereby a person is prevented (or excluded) from contributing to and benefiting from economic and social progress (European Commission 2020d), while social inclusion, on the opposite, encompasses measures by various actors (including migrants themselves) that aim at including

them in society in regards to income, poverty, health and housing (Huddleston et al. 2013, European Commission 2020e).

Putting the individual's strife for participating in the economic, social, cultural and political life of the host society and associated societal frameworks at the core of the debate, Ager and Strang (2008) developed a mid-level theory for analysing integration, both from the perspective of migrants, in this case refugees, and the local or receiving society. Ten interdependent key dimensions, which are presented hierarchically, represent the core of the theory. Citizenship and rights provide the basis to access the sectors employment, housing, education and health, while social connection, among others, plays an important role in facilitating and "in driving the process of integration at a local level" (ibid: 177). In this course, local spaces may either be experienced as sites of conviviality or conflict (Radford 2017). Language and cultural knowledge as well as safety and security in the local environment are further facilitators to access employment, housing, education and health (Ager & Strang 2008; cf. Chart 2). Due to the fact that spatial mobility is especially important in rural and mountain areas, the model was expanded by this additional facilitating key component (Weidinger et al 2017; Weidinger 2018).

In MATILDE, we consider this model as a starting point for structuring the evaluation of migrant's impacts and simultaneously intend to show the complexity, i.e., interdependencies between realms sketched below. What Ager and Strang (2008) termed key dimensions of integration serve as realms of interaction between immigrants and infrastructures, institutions and finally territory.

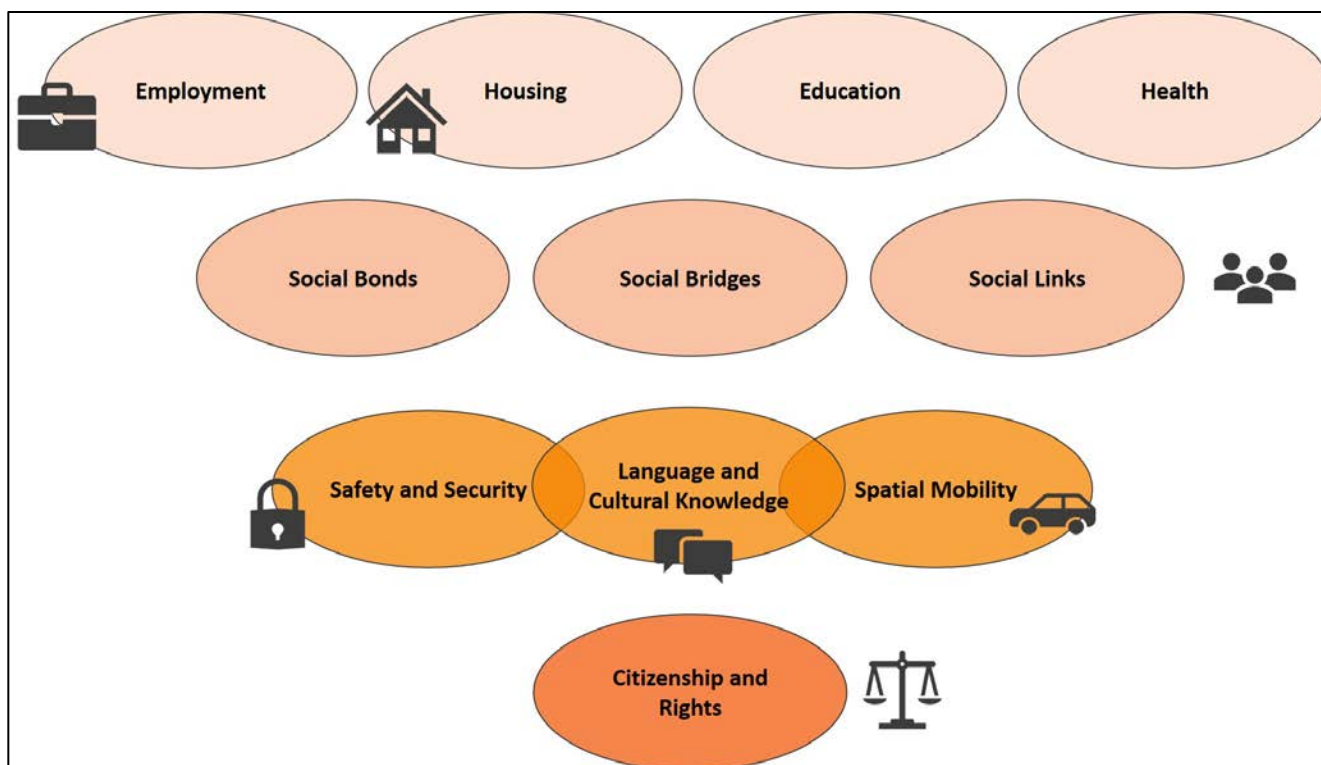


Chart 2: Integration model

Source: own elaboration based on Weidinger et al. 2017: 50; adapted after Ager & Strang 2008

Under the key component “**citizenship and rights**”, Ager and Strang subsume legal basic conditions for the integration process. On the one hand, these encompass assured rights, such as freedom of religion and political expression or equity before the law, which can be exercised by the individual (ibid., e.g. Directive 2000/43/EC on racial equality or Directive 2000/78/EC on employment equality, OECD & European Commission 2015). On the other hand, migrants can have certain obligations like participating in a language course or taking a place of residence in rural and mountain areas, for instance. Rights and obligations may enable or prevent them to access and interact with further realms presented below.

An important realm for integration is **access to education/interaction with educational (infra)structures** that allows migrants to gain further skills and competencies for social interaction and a later job. Education infrastructures are often only accessible at large expense of time and money, as public transport is weakly developed and/or expensive (SVR 2016: 30). **Access to employment/interaction with labour market (infra)structures** enables migrants to contribute to economic independence, but also provides contact opportunities and facilitates planning for the future (Ager & Strang 2008). When searching for a workplace, for instance,



ethnic networks are highly relevant (Stewart & Shaffer 2015). Experiences reveal that especially in rural and mountain areas, in which there are often few ethnic networks, migrants may struggle to find suitable workplaces or are employed in the low-wage sector as a consequence of non-recognition of qualifications or former work experience (Ager & Strang 2008; Valenta & Bunar 2010; Schech 2014).

Integration also depends on conditions and experiences of migrants with regard to the **access to housing/interactions with housing (infra)structures**. In previous studies, interdependences between housing and physical and emotional well-being, attachment and security could be detected (Phillips 2006; Ager & Strang 2008). Satisfaction with an apartment is influenced by different aspects, including but not limited to its size, quality and facilities, the accessibility of health and education infrastructures as well as workplaces, its living environment and its price and contract situation (tenant vs. owner, temporary vs. indefinite; *ibid.*; Stewart & Shaffer 2015). Besides structural conditions of the housing market, e.g. share of vacancies, rental level, mechanisms of access determine whether migrants are able to rent apartments or houses in rural areas (Weidinger & Kordel 2020, *under review*). Discrimination associated to fear of landlords to let to migrants are most important obstacles, while support by local population and social proximity make it easier to access housing (*ibid.*)

**Access to health(care)/interaction with health(care) (infra)structures** is important for migrants' health and well-being. However, the accessibility of health infrastructures in general and the one of medical specialists may be aggravated in rural and mountain areas, while language and cultural barriers may be hard to bridge (Correa-Velez et al. 2013). Subsequent to traumata often experienced in war zones as well as within the migration trajectory, **safety and security** play an important role for migrants in general and humanitarian migrants/refugees/forced migrants in particular. This encompasses the absence of actual violence and verbal abuse as well as the perception of a locale as safe (Ager & Strang 2008). For rural and mountain areas, safety and security is evaluated ambivalently. Whilst migrants experience racism also in rural areas (Garland & Chakraborti 2006), others consider rural localities as safe compared to their countries of origin and support this by showing gratitude for their reception. Especially TCN families highlight safety

for children and the opportunity to raise them in a protected environment far from bad influences exposed in cities (Stenbacka 2012).

The ability to communicate in the **language** of the country where one lives as well as offers in languages that migrants are able to understand ease their access to employment, education, housing and health(care) as well as to build social connection. Strongly linked to that is **cultural knowledge**, both of migrants about national and local customs and practices as well as receiving societies' knowledge about migrants and their cultures.

Ager and Strang (2008) further suggest that **social connection** plays an important role “in driving the process of integration at a local level” (ibid.). They distinguish between social bonds, social bridges and social links, drawing on reflections about social capital discussed by Putnam (1993). Relations to family members, ethnic, national or religious communities (social bonds) enable migrants and refugees to share cultural and social practices and “maintain familiar patterns of relationships” (Ager & Strang 2008). Besides, these networks can also be made fruitful to establish new contacts and receive assistance, information and to orient oneself in a new environment (Simich et al. 2002; Schech & Rainbird 2013). Dependent on the migration history of a certain place, ethnic communities are absent in rural and mountain areas or are very small in number, which is able to hamper the self-organization of migrants (Hugo 2008; Kirchhoff et al. 2011). This, in turn, can result in a feeling of social isolation (Simich et al. 2002), particular visible in public space deriving from visual appearance or style of clothing (Netto 2011), or discrimination. Thus, refugees may decide to leave these places (Stewart & Shaffer 2015). Intra-ethnic conflicts, the desire for privacy, or intensified contacts with the local population, however, can also lead refugees to intentionally avoid social proximity to ethnic communities (Schech 2014; Stewart & Shaffer 2015).

Against the backdrop of a non-existing or numerically small ethnic community in many rural and mountain areas, migrants are very much reliant on establishing contacts with the local population (social bridges, Ager & Strang 2008) to get access to employment, housing, education and health infrastructure (de Lima et al. 2012; Schech & Rainbird 2013) and thus overcome social exclusion. To that extent, they are supported by actors in civil society, i.e., volunteers, churches and welfare organizations (de Lima et al. 2012; McAreavey 2012). Apart from this, different authors

ascribe importance to clubs and associations when talking about integration in rural areas (Kirchhoff et al. 2011). If members of the local population, however, have not had experience of “the other” in the past (Glorius 2017) or if they see refugees as a threat to their workplace, their “rural idyll”, their cultural traditions or their own identity, challenges for the establishment of social bridges can emerge (Hubbard 2005; Connor 2007).

The last type of social connections, social links, encompasses relations between migrants and governmental structures and institutions and refers to the ability of public administration to meet their special needs and grant them access to specific services on a basis equal to national citizens and in a non-discriminatory way (Ager & Strang 2008). Local administrations in rural and mountain areas often lack institutional capacity and knowledge about the claims and assured rights of different migrant groups (McAreavey 2012). This may be aggravated by the fact that employees are short of intercultural experience and language competencies for dealing with ethnic diversity. Simultaneously, the scope of action could be limited due to a lack of human and financial resources (Kirchhoff et al. 2011; de Lima et al. 2012).

**Spatial mobility** has an important and supportive role, especially in rural and mountain areas, and refers to the (cap)abilities of an individual to move and/or commute from their residential space(s) to access employment, education and health(care) as well as to create and maintain social contacts and networks. Therefore, the model was expanded by this additional facilitating key component.

Concluding from the analysis of key components of integration, **rural and mountain areas can have heterogeneous preconditions** with regard to the different components. Simultaneously, within MATILDE, the sketched **dimensions are being subject to changes subsequent to the arrival of TCNs**. Therefore, analyses of TCNs impact are interrelated to the realms of integration.

## 4. MIGRATION AND DEVELOPMENT

### 4.1 MIGRATION-DEVELOPMENT NEXUS

Author: Tobias Weidinger

In general, population growth and economic growth are interdependent as more workers increase the economic productivity (Golding & Curtis 2013). Since the 1960s, the migration-development nexus was discussed for the so-called “sending countries” in general and for rural places of origin in particular, where migrants’ remittances, resources or assets arrive and contribute to help to finance domestic development (Nyberg Sørensen et al. 2003; van Hear & Nyberg Sørensen 2003; Nzima et al. 2017). In war or conflict zones, remittances from abroad may also help families to survive and to sustain communities (Nyberg Sørensen et al. 2003). In the 19<sup>th</sup> and early 20<sup>th</sup> century, **interdependencies of migration and local development** were also considered for “receiving countries” until this shifted towards a perceived need for stricter immigration controls and regulation and securitisation (ibid.). However, due to the demographic transition, i.e. the decline in birth and death rates resulting in fewer children and longer life expectancies, as well as the out-migration of the young as a consequence of economic restructuring, nowadays, many rural areas of the Global North relied and still rely on the inflow of workers (Golding & Curtis 2013). In this regard, immigration holds a certain development potential and becomes increasingly relevant in population and regional policies in various EU member states (for examples see MATILDE Deliverable 2.1).

### 4.2 MIGRATION AND RURAL DEVELOPMENT POLICIES

Authors: Ingrid Machold and Thomas Dax

Rural development policies represent an important pillar in EU policy and have a long tradition. Core issues will be sketched in the following, whilst, afterwards, implications of immigration for rural development, in a broader sense, will be illustrated. In the understanding of the MATILDE project, the latter encompasses all activities of political, economic and societal actors and stakeholders who unintentionally achieve or intentionally strive for improving the socio-economic circumstances in rural areas (Kordel & Weidinger 2020).

Since the early 1990s, rural development has emerged as an important European policy field. In its early days, rural policy discussion was linked to the rising challenges of abandonment and economic shrinkage of rural regions, and focused on an increasing recognition that spatial imbalances and socioeconomic inequalities have to be addressed through effective policies, if cohesion and integration of the European Union should be realised. The European Commission's communication "The Future of Rural Society" (CEC 1988) was regarded as the starting document indicating the remit for a European rural policy. Its aim was to "see" and activate the potential of rural areas and mobilize its inherent endogenous resources (see also **endogenous rural development**, e.g. Margarian 2013).

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## UNDERSTANDING RURAL DEVELOPMENT IN EUROPEAN POLICY PRACTICE

Analysing rural development from an EU policy perspective reveals the long-term policy concern to acknowledge the specificities of rural areas and placing its amenities at the core of development. However, despite the significant challenges to achieve balanced territorial development, the shift towards adopting an integrated approach remained limited and policy commitment for rural well-being is still a strongly competed area (Copus & Dax 2020). Focusing on the two main EU policies impacting on rural regions, i.e. the EU Rural Development Policy (RDP) and the EU Structural Funds Policy (Cohesion), the analysis of Copus and Dax (2020) revealed that the territorial dimension of geographical targeted programmes within these policies was since long a policy goal. In particular, it was an inherent part in the respective policies before the millennium (e.g. Less Favoured Areas (LFA) approach in the former CAP and Objective 1, 6 and particularly in 5b<sup>9</sup> of the then Structural Funds) but more recently this focus has been neglected or subsumed in other targets. With regard to rural and regional development and their impact on demographic processes, main assumptions, which influence and determine direction and outcomes of development policies in rural areas, have been adapted into a constant emphasis upon jobs, growth and innovation associated with the Lisbon and 2020

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<sup>9</sup> Lagging rural areas having been tagged and financed as "Objective 5b" areas.

Agendas, but also upon the rising awareness of environmental issues, and subsequently climate change, as will be described in the following sections.

Starting with the development paradigm of the Cohesion policy, there has been a remarkable shift in the policy focus since the millennium. EU cohesion policy has replaced its previous philosophy of addressing territorial disparities and place-based socio-economic handicaps (like in the approach of the LFA policy) with a more self-determined alignment of realising local and regional potentials (ibid.). Emphasis has been put on the potentials of unique territorial assets and capacities in each locality with a stronger focus on a „place-based policy“ (Barca 2009) that is also capable to expand on the needs of rural areas. However, such a **”neo-endogenous“ rural development approach** (Shucksmith 2010) runs contrary to mainstream assumptions of spatial concentration processes. It is contradicting the deep-rooted “convictions“ that innovation and growth is more or less inherently favouring agglomerations, while sparsely populated areas can hardly escape its “economic“ disadvantageous status (Perlik & Membretti 2018). The strength of the “cities as engines of growth“-assumption among decision-makers and regional practitioners also implies that the development of rural regions is receiving much lower priority and less attention compared to innovation strategies and economic expectations for cities and towns. It is no surprise that under these large-scale adverse conditions attempts to cope with “shrinking rural regions“ were hardly successful. Even more, population movements of many remote rural regions have been viewed through one-dimensional flows of out-migration, largely neglecting “in-flows“ of diverse nature. At least this observation calls for a reassessment of the perception of the traditional rural development approaches and an inclusion of the assessment of the roles of the new entrants into rural regions.

The policy, which is most directly linked and associated with rural development is the **Second Pillar of the Common Agricultural Policies (CAP)** which is implemented through Rural Development Programmes on member state or regional level. Albeit a shift towards more territorial balance and a strategy to nurture the territorial dimension within the rural policy has been advocated since long (Buckwell et al. 1997), adaptation in budgetary terms was gradual and hardly altered the overall impression of a “sectoral“ RDP. The persistence of the sectoral approach was justified by the promotion of the concept of “multifunctionality“ of agriculture

which puts agriculture in the centre of local and rural development. Accordingly, high shares were expended for farm restructuring and investments, competitiveness and agri-environmental measures in recent RDP periods. The debate related to a number of concepts, indicating the linkages of land management to other economic activities and wide-ranging societal functions of it. This includes the consideration of ecosystem services and public goods provided by agriculture and forestry, including aspects of landscape development and rural vitality. A more comprehensive analysis of the major concepts relevant for rural development (sustainability, ecological modernisation, commodification, post-productivism, rural restructuring, globalisation vs. local autonomy, and networks) particularly included a series of “buzz-words” that indicate the complexity of rural policy (Copus & Dax 2010). Despite the long-lasting discussion on the societal needs of rural regions those measures revealing a priority on “social inclusion and economic development” accounted only for a comparably low proportion of Pillar 2 expenditure.

One of the most interesting and sustained activities in this respect is the **LEADER<sup>10</sup> initiative** which enables local action in rural areas throughout the EU since the early 1990s<sup>11</sup> and might be understood as “flagship approach for rural development” (Dax & Copus 2018). From its start, the LEADER initiative is appreciated as it addresses the spirit of mobilising the countryside through focusing on endogenous potentials and activating local stakeholders across all sectors (Dax & Oedl-Wieser 2016), including networking and trans-national cooperation (Dax & Copus 2018). Despite the comparably small amount of financial resources, the LEADER initiative yielded many good practice examples and success stories of local development (see publications at the ENRD website). “New” social groups, including migrants, but also a number of „marginal“ groups, like young people, persons with disabilities, and women have been addressed, following the request to include all parts of the rural population. However, topics of migration into rural regions or integration have not achieved an increased focus until the last funding period, and then particularly for a short term since 2015 accompanying the enhanced migrant and refugee

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<sup>10</sup> LEADER is the acronym for the French denomination of the initiative “*Liason Entre les Actions de Développement de l'Économie Rurale*”, which can be translated with “Links between actions of rural economic development”.

<sup>11</sup> The LEADER initiative was established as the European Commission’s “Community Initiative” for rural areas in 1991.

movements<sup>12</sup> (Machold & Dax 2017). The ENRD (2016) considered the “(i)ntegration of working-age migrants [...] one way to reverse depopulation trends, leading to the maintenance of reopening of public services, and the creation of new jobs and economic development in rural areas” (ibid.: 3). The brochure on migrants and refugee integration also presented best practice projects, whilst the flexibility of the LEADER approach as well as the willingness of certain local communities to direct their funding to respond to the local challenges posed by increased immigration were highlighted as factors of success (ibid.).

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## THE IMPLICATIONS OF IMMIGRATION IN A WIDER RURAL DEVELOPMENT APPROACH

In general, the discourse on European rural and regional development is of a much wider scope than European policy practice of the last two decades would suggest. It can be subsumed as all activities of political, economic and societal actors and stakeholders who unintentionally achieve or intentionally strive for improving the socio-economic circumstances in rural areas (Kordel & Weidinger 2020) that were recently discussed as “places that are left behind” (Rodríguez-Pose 2018). In the manifesto of the European Rural Parliament 2017, accordingly, the future of rural Europe is perceived as places „of vibrant, inclusive and sustainable communities, supported by diversified rural economies and by effective stewardship of high-quality environment and cultural heritage“ (European Rural Parliament 2017: 2).

Acknowledging the specificities of rural areas and placing its amenities in the core of development action has been a long-standing ambition of national policies in many OECD countries (OECD 1999). The desire to alter the discourse from a defensive attitude, i.e. considering rural regions as “victims” of agglomeration and globalisation processes towards an active strategy to tapping into the respective local potentials, led to the elaboration of the “**New Rural**

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<sup>12</sup> In the last funding period (2014-2020) LEADER and for a wider application in other funds (ERDF and ESF), the multi-funded Community-Led Local Development (CLLD) activities were subsumed in the priority 6 of the RDP “social inclusion and economic development“. As a specific priority of the rural policy LEADER/CLLD had to achieve at least 5% of RDP expenditures.



**Paradigm**“ (OECD 2006). The paradigm emphasises competitiveness and the active participation of local people and gives priority to local assets as development resources. To achieve effective policy changes, however, a more rigorous “place-based approach and more direct expressed reference to rural needs and regional diversity“ (Dax & Copus 2018: 207) is fundamental. Quality of life issues and well-being in rural areas are gaining increasing relevance as key drivers for regional development (OECD 2014), indicating a shift in the underlying priorities of strategic concerns (OECD 2020). Hereby, the concept of social innovation is paramount for a place-based, socially inclusive development of rural areas, which promotes the empowerment of civic initiatives and cooperative action. Although the concept is contested as state withdrawal is feared to represent a side effect of the shift from public towards private responsibility, it is particularly interesting because of its focus on social and relational aspects in rural development and broader processes of social change in rural areas (Bock 2016), providing ample scope for local activities and recognition of specific societal needs.

As mentioned above, the ongoing counter-urbanisation and significant alterations in spatial movements towards rural and mountain areas have resulted in a positive migratory balance in many rural contexts of Western Europe. Rural areas are increasingly experiencing in-flows of migrants of different ethnic, socio-economic and cultural backgrounds, intentions and through differing channels of arrival. Particularly local (administrative) actors have started to acknowledge the growing social and cultural diversity and the integration of migrants as an important challenge in an earlier phase. Although action has been scattered, this has led to several important examples with highly interesting approaches of integration and inclusion of migrants (Machold & Dax 2017). Due to the spatial extension of destination areas of migrants, the link between immigration and rural development has gained increasing interest. Migration as a potential to trigger development has also been highlighted in other reports (e.g. OECD 2018; Gauci 2020), going along similar lines namely as counter process to depopulation and economic decline. An important enabling condition deduced from three best practice examples analysing the successful integration of migrants (including refugees and asylums seekers) can be viewed in their integration into the local development strategy (Gretter et al. 2017). This implies the incorporation of integration goals into already existing welfare, health, educational, and housing

policies, suggesting that stable jobs and accommodation enhance attractiveness for migrants to stay in remote and local localities (Galera et al. 2018).

## 5. OUTLOOK: IMPACT OF MIGRATION IN RURAL AND MOUNTAIN AREAS

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Immigration processes result in various transformations at rural and mountainous places, based on manifold interactions between TCNs and local structures. The quantity and quality of transformations depends on

- The compositions of TCNs, e.g. demographic factors (gender, age, family status, citizenship, country of birth, country of birth of parents, length of residence, age of arrival), socio-economic factors (education, employment, income, occupation, level of development of country of origin), socio-cultural factors (mother tongue, language acquisition, Huddleston et al. 2013: 14-15),
- general policies and spatial contexts, e.g. labour market structures and economic growth, the education system, the welfare system, the housing market and public opinion (ibid.: 18), and
- Migration and targeted integration policies, i.e. policies regulating the entry of immigrants and the ones focusing on the situation after having settled in the country, e.g. labour market policies, education policies, social policies, naturalization policies (ibid.: 22).

The state of the art concerning impacts of various groups of migrants in European rural areas is briefly sketched in the following, focusing on social, cultural and political transformations in local societies, rural economies, the housing market and finally the territories.

With respect to **social and cultural lives as well as politics**, newcomers may impact local identities, the cultural heritage and pathways of reproducing the cultural landscape (Gretter et al. 2017; Pereira & Oiarzabal 2018). However, the engagement of immigrants in rural and mountain areas and refugee migrants in particular, depends on the citizenship status as well as migration and integration policies. Especially undocumented workers may limit their engagement in community and civic life (Golding & Curtis 2013). Besides, the reaction to social and cultural change among receiving societies (Viazzo & Membretti 2019), either hostile or with a deliberate

welcoming culture, differs according to recent (non)experiences with foreign immigration or other transformation processes (Glorius 2017) as well as attitudes of local elites.

**Rural economies** may benefit from the demand of new inhabitants in general, whilst relatively well-off and affluent migrants have a greater impact due to their expenditures in daily goods, consumer durables and craft services as well as their demand for service workers that are more or less resilient to economic cycles (Golding & Curtis 2013). Especially pre(retirees), arriving as lifestyle or return migrants, can draw on monetary resources (Janoschka 2009). Labour migrants frequently provide unskilled and poorly paid labour to rural economies fostering the rise of dual or segmented labour markets (Kasimis & Papadopoulos 2005), but may partially send back their wages to their home country (Golding & Curtis 2013). Besides the agricultural sector, the construction and tourism sector are favoured by labour migrants in rural areas, whilst for some, rural areas are addressed as a place of transit (Corrado et al. 2016). In addition, provided that having certain legal rights, migrants may also become self-employed and can thus extend the range of goods and services available on-site or can even offer new work places.

Whilst a changing demand on **rural housing markets** induced by immigration is widely observable, it also depends on the immigrants' socio-economic structures. While lifestyle migrants ask for well-equipped real estate or buildings in the historical centre of small villages, a price increase may exclude or even displace local population (Phillips 2006; Weidinger & Kordel 2015). For forced migrants, there is a particular demand for group accommodations, which are often located in peripheral areas. Former tourist accommodations are frequently used for this purpose (Weidinger 2018). Since the share of social housing in rural areas is relatively low in many European countries, refugees rely on the private market and are offered accommodations in poor conditions. Similar evidence is given for seasonal agricultural migrants (e.g. Meier 2013).

**Territorial impacts** are observable in changing urban-rural relationships and the redistribution of resources. Since rural and mountain areas were or are affected by phenomena such as depopulation dynamics or labour force shrinkage, expected territorial impacts are encouraged politically. Revitalization of sparsely populated areas through immigration is a narrative discussed for instance in Sweden or Spain (e.g. Stenbacka 2013; Lardiés-Bosque 2018), whilst counteracting labour shortages is common in Germany or Austria. The provision of certain

infrastructures may also be boosted by immigrants. If immigrants arrive with young children, for instance, they contribute to school enrolments, which may keep schools open, which in turn supports middle-class jobs (Golding & Curtis 2013). Peripheral rural areas increasingly compete for new inhabitants, who are mainly of younger age, well-educated and economically strong. They are in the focus of marketing campaigns in some municipalities (Kordel et al. 2018).

In light of the scarce availability of migration impact analyses that are evidence based and focusing on more than one single realm, MATILDE WPs 3, 4, and 5 aim at reducing this gap. The assessment of social, economic and territorial impact will be further conceptualized and conducted in the following WPs.

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