



families commission
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LES FAMILLES ET WHĀNAU SANS FRONTIÈRES:
NEW ZEALAND AND TRANSNATIONAL FAMILY OBLIGATION

NEIL LUNT WITH MERVYL MCPHERSON AND JULEE BROWNING
MASSEY UNIVERSITY AT ALBANY

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The project team consisted of Dr Neil Lunt, Dr Mervyl McPherson and Julee Browning. Neil Lunt was project leader and responsible for collating information, planning, and writing the final report. Mervyl McPherson provided input and expertise around demographic data sources and use. Julee Browning provided research assistance for the project, including literature search and retrieval, and undertaking some of the informal discussions.

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1.0 FAMILIES COME IN ALL SHAPES AND SIZES

Social policy has traditionally approached problems and developed responses within the confines of the nation-state. The Welfare State developed social security programmes for people of working age unable to find work, and old age and disability pensions for those no longer in the domestic labour market, while health and social services were delivered to the 'national population'. Viewed historically, family policy has fitted comfortably within this framework, concerning itself with state legislation and services and, more recently, the distribution of services, resources and power within household and close kinship relationships (Pahl 1985, 1989; James and Saville-Smith 1994).

Significant economic, social and political changes occurring at the global level are, however, challenging this national focus. These developments transcend national boundaries and emphasise movement and mobility – of peoples, products, capital and ideas. Increasingly, domestic social policy must be conceptualised in its interrelations with these global trends (for example greater ease of movement and economic restructuring), international or regional institutions (such as the United Nations and European Union), and global social problems (global pandemics, human trafficking, environmental security).

Such changes in economic production, migration, and emerging communication and travel technologies have revolutionised the contemporary social world (Giddens 1991; Castells 1996). Less well understood is how such processes are eroding traditional categories of social policy analysis and suggesting new ones. This includes how families are 'stretched' beyond national boundaries to become what are variously known as dispersed, global or transnational families. Discussion of macro level changes must be complemented with analysis of such micro and meso levels (including individual, household and kinship relations) and that evokes a complex web of relationships, exchange, networks and communities (Faist 1999).

As a working definition, transnational families are 'families where some members of the family network are anchored in one place, based either in New Zealand or overseas countries, but where family relationships transcend national boundaries.' These anchors are cast for short and long durations (including indefinite and 'foreseeable' futures) and involve multidirectional and routine 'flows' among these family members. Flows may be financial but also encompass emotional exchanges, the acceptance of obligations, and dimensions of caring and 'family binding' in the strengthening of family relationships that endure, despite the family being spatially dispersed. Such flows and exchanges are not simply derived from a pre-existing set of family relations; rather they help constitute and reproduce these relations over place and time. Arguably, New Zealand, given its location and history, provides abundant examples of such transnational family exchanges.

Transnational families are of intrinsic interest but also have unexplored policy implications. The boundary between family and state responsibility is contested (cf. McPherson 2003), and this boundary is further blurred around transnational families.

This review sought to explore the phenomenon of transnational families in greater detail, and to address a number of interrelated questions focused around New Zealand's transnational families:

- > *Why* do transnational families form?
- > *How* do transnational families form?
- > *What* do transnational families look like: their size, geographical dispersal, and cross-country linkages?
- > *When* do transnational families form in life cycles, family cycles, and generation cycles?

This study of transnational families examined migration as both inward and outward flows of migrants to New Zealand from overseas, as well as outward flows of New Zealand citizens and permanent residents to overseas locations. Such binary categories (inward/outward) are themselves inherently problematic in the light of emerging empirical evidence around complex and continuous flows. Thus the task was to understand better the dynamics of New Zealand's transnational families, which necessitated a consideration of past, present and emerging trends. The review sought to be wide-ranging and exploratory, drawing on the rich national and international scholarship that exists, and

utilising a multi-disciplinary approach in describing trends and exploring concepts around transnational families.

A range of national and international literature was reviewed using search engines and databases, including completed and ongoing research programmes undertaken by the Migration Research Group at the University of Waikato, the New Settlers Research Programme at Massey University, and the New Zealand Immigration Service's own research programme.

The study also undertook scoping discussions with a small number of key stakeholders and organisational spokespeople (such as organisations working with older people and organisations advocating for migrant groups) to help outline emerging issues that, up to this point, were not well understood. Finally, but no less importantly, there were countless informal – and informative – conversations with friends, colleagues and acquaintances currently living transnational family lives. The (strictly hypothetical) scenarios used in Section Six are informed by these very real circumstances that individuals highlighted.

1.1 MIGRATION

Individuals migrate for a range of reasons that include economic opportunity, but migrants are not simply utility maximising agents. Understanding migration as a simple response to economic incentives risks erroneously equating migrants with 'workers', and viewing non-workers as categories of 'wives' or 'dependents'. The context within which decisions are made cannot be reduced to solely economic concerns. Individual workers are part of families that may include nuclear members (spouses and dependent children), or wider family relations (parents, siblings, non-dependent children). Social networks help shape migration outcomes: from no migration to continuous migration (cf. Boyd 1989: 639). Recent approaches to migration emphasise the household as the decision-making unit, avoid elevating economic pressures, and also focus on explaining mobility and immobility (Massey et al 1993; Hammar et al 1997; Arango 2004). A methodological synthesis drawing on network theory and structural understandings has proved fruitful and powerful in explaining how migration is produced and reproduced through time. Better understanding of transnational families may also contribute towards knowledge of migration processes.

The task of exploring transnational families is hampered by the ways in which disciplines and fields of study have been segmented. The family literature traditionally assumes proximity, yet processes of economic globalization, technology, and migration have radically altered family form and function (Schmalzbauer 2004). While migration traditionally emphasises episodes (flows in and out), far less is known about the transnational family relationships that endure and the flows of resources and obligations through family ties across nations. These flows are financial and emotional, including remittances, as well as obligations to care for, be near, and support ageing or dependent family members.

The transnational family is enmeshed in cultural, economic and political considerations and this requires wide lenses to be brought to bear. Indeed, as Yeoh (2005) writes:

To understand transnational families, we need to give attention to every dimension, from the political, economic, cultural, social, sexual, to the religious and moral dimensions of living transnationally.

To do this adequately must necessarily encompass a range of social science disciplines and sub-fields: sociology, gender studies, demography, human geography, migration studies, family studies, anthropology, social policy and gerontology. The writings around transnationalism and the social policy field have often talked past each other, constrained by their disciplinary boundaries and using different vocabularies and concepts. This study aims to contribute towards the bridging of this gap. The aims of the study were:

- > A typology of different groups and sources of transnational communities, drawing on historical and contemporary flows and, within that, transnational family forms.
- > Wherever possible, a demographic analysis of these transnational populations and family forms.

- > A conceptualisation of the differing network relationships.
- > To contribute towards a theorisation of transnational families within the New Zealand setting.
- > The beginnings of a 'futures audit' of emerging public policy issues vis-à-vis New Zealand's transnational families (social security, retirement, immigration and intergenerational family supports).

In defining family some take biological 'relatedness' and co-residence as key characteristics (Low 2004). However, co-residence is not essential to sustain highly interdependent relationships (Elliot and Gray 2000), and certainly this is an axiom for discussing transnational families as well as reflecting how families operate across households at a national level (eg grandparents caring for grandchildren, and separated and divorced parents of children). For Silverstein and Auerbach (2004: 33) a family may be defined as 'two or more people who are in a relationship created by birth, marriage, or choice', a definition not too far from the Families Commission's own definition of 'family' as:

A group of people related by marriage, blood or adoption, an extended family, two or more persons living together as a family, and a whanau or other culturally recognised family group' (2004: 7).

What then of *transnational* families? As we shall see, transnational families do indeed come in many shapes and sizes and, moreover, show an ability to continuously evolve and mutate. They may include more than one ethnic group over more than one country and still retain their identity as a family (Elliot and Gray 2000). As Bryceson and Vuorela (2004: 3) suggest such transnational families:

Live some or most of the time separated from each other, yet hold together and create something that can be seen as a feeling of collective welfare and unity, namely 'familyhood', and even across national borders.

1.2 PAST AND PRESENT MIGRATION

New Zealand is a country built on successive waves of migration, with around 20 percent of its current population born overseas. Those born in New Zealand comprise one of the world's most mobile populations, with around 500,000 New Zealanders based overseas (Bryant and Law 2004). Three themes underpin New Zealand's migration history: a process of colonisation, New Zealand's Pacific location, and, more recently, a series of intensified global pressures.

Following the signing of the Treaty of Waitangi in 1840, the settlement of New Zealand during the 19th Century was by predominantly Anglo-Celtic stock. 'Settlers' were drawn to New Zealand by the availability of work and land, and the belief that it offered greater opportunities for security and prosperity than places of origin. Indeed as one early immigration consultant noted:

In our colonies are neither Poor Laws, want of employment, low wages, nor any of the causes which at home depress the energies and embitter the existence of the labouring man. (Earp 1849: 5).

Steady flows continued from the British Isles during the 19th Century under assisted passage. During times of depression and boom, cross-Tasman flows would increase, and those seeking their fortunes on the gold fields also swelled migrant numbers. Between the years 1890-1920 settlers were also drawn from Continental Europe, and included Dalmatians, Greeks and Italians, as well as numbers of Asian, Chinese and Indian settlers.

The inter-war Depression saw a stemming of these migration flows, although the period did see new routes of arrival including émigrés and refugees from Europe. Post-1945 there was a rapid expansion of migration from the traditional source of Britain, with 76,673 assisted immigrants arriving during the period 1947-71. Flows also continued from Continental Europe, including 6,261 assisted immigrants from the Netherlands, mostly between the years 1951-64. From the 1930s New Zealand increasingly wrestled with its European heritage and Pacific location. The majority of the New Zealand population had been born in New Zealand by this time, which encouraged a cultural nationalism but not yet a Pacific identity. Only 2,000 people were recorded as having Pacific origin in 1945, but this was up to

50,000 by 1971 (Cook 1999). A Samoan quota was established in 1962, and those born in the Cook Islands, Niue and Tokelau had New Zealand citizenship and automatic right of entry to New Zealand. Growing numbers of Pacific people from these countries and others, including Tonga and Fiji (migrants and New Zealand born) mean that 230,000 people now identify themselves as being of Pacific ethnicities (Macpherson 2004).

Immigrants from the traditional sources of the United Kingdom and Australia dominated up to the early 1980s. Until 1974 there was unrestricted British access to New Zealand, but after this date visas were required. The Trans-Tasman agreement of 1973 confirmed an open labour market and the free movement of New Zealanders and Australians across their respective borders.

From the 1970s global economic, political, social, demographic, and technological trends have shaped the contemporary picture of New Zealand migration. International flows of trade and capital have intensified, and combined with the ageing labour force result in fierce competition for highly skilled workers in what is, effectively, a global labour market. Regional instability and inter- and intra-country conflicts have also increased the numbers of at risk and displaced persons internationally.

In the 1980s, the New Zealand economy deregulated and liberalised, and the search for skilled labour and business investment saw New Zealand look towards the Asia-Pacific region. The end of traditional source country immigration was signalled in 1986, and skill replaced country preference as the basis for migration. Between 1991 and 1996 a points-based system operated with no set cap on residency numbers: those meeting the minimum criteria were approved for residency. Pacific and Asian migrants (including those from Hong Kong, Taiwan and Korea) joined those from traditional countries of the UK, Australia, Canada, the United States and Western Europe. An immigration target is set annually, which determines the maximum number of new migrants that can be approved for residence each year.

Attempts to source global business investment saw the establishment of business investment for residency with a series of categories fulfilling this function: Entrepreneur, Investor, and Employees of relocating businesses. The General Skills Category was replaced in 2003 by the Skilled Migrant Category. There is also a range of interim measures to address New Zealand's skill shortage, including the Work to Residence programme. Skill and Investor Categories allow residency applications to be made by Principal Applicants, who may also be accompanied by Secondary Applicants and families.

There are also distinctly social forms of migration that allow permanent residents to sponsor family members, or allow residency to be obtained on non-economic grounds. The Family Sponsored Stream of migration allows residency for partners, parents, siblings, dependent children, and adult children of permanent residents. For example, parents of migrants may be eligible for residency if they have no dependent children and all of their children live outside of the parent's home country, or if the 'centre of gravity' of their family is in New Zealand. Siblings may be eligible for residency if they have no immediate family in the home country, have a job offer, and are able to support any dependents they have.

The Family Quota provides a further route for family migration. Those not eligible for residency via Family Sponsorship register by way of a ballot from which a set number of applicants are drawn annually. The Family Quota only operates when there is less demand under the Family Sponsored Stream and in 2005 there were no places available under the Family Quota.

Social migration also includes International and Refugee categories. Around 750 refugees per year enter New Zealand under the Refugee Quota of the United Nations High Commissioner for Refugees. Under the 1995 Refugee Status, residency is granted for approved asylum seekers. The Refugee Family Sponsored Quota, set at 300 persons and balloted annually, provides opportunity for family reunification of refugees. Pacific commitments include the Samoan Quota of 1,100 (including partners and dependent children), which is available through a ballot for those aged 18-45, and the Pacific Access Category (PAC) which is also balloted and for the 2005/2006 financial year allows entry of residents from Tonga (250 persons), Tuvalu (75), Kiribati (75), and Fiji (250), including their partners and dependent children.

The other side of the migration ledger is the international migration pattern of New Zealanders, which as some have noted, has become a 'morbid fascination' of the New Zealand media (Bedford 2001: 49). Net permanent and long-term migration balances the return and exit of New Zealand citizens, and the arrival and departure of non-New Zealand citizens. Net permanent and long-term migration is

volatile and dependent on current policy, past policy and time-lag factors, as well as the economic situation. From 1976 to 1989 New Zealand had net population loss to migration in all years except 1983. Since 1989 New Zealand has had net gains in all years except those of 1998-2000 (Statistics New Zealand 2004a, Table 9.01).

Given that more people 'permanently' migrate to and from New Zealand than in the past, migration has taken on a heightened profile (Department of Labour 2002; Bedford 2003). Migration flows are inextricably bound up with discussions around economic competitiveness and social and welfare sustainability, and also inform fundamental debates about identity and citizenship. Policy has developed that aims at ensuring that migrants settle better within New Zealand, and has further policy initiatives concerned with retention and return of New Zealand citizens (Department of Labour 2002; NZIS 2005a).

2.0 'PASSPORTS TO THE EDGE': MIGRATION TO NEW ZEALAND

This section discusses arrivals to New Zealand, sketching the various flows that contribute to the formation of transnational families. There are three broad routes to long-term and permanent residency in New Zealand:

- > **Economic opportunity migration** gives entry for work and investment purposes. A subset of this is organisation migration that includes intra-corporate transfers, diplomatic and military postings. A further related consideration is education migration such as entry for high school, university and professional study.
- > **Safety migration** gives entry on refugee and humanitarian grounds.
- > **Relationship migration**, which encompasses various forms of marriage and family sponsorship.

Migration is frequently a stepped process and as well as permanent residency per se, it is helpful to reflect on steps such as work and study visas to broaden our understanding of migration processes (cf. Ho and Bedford 2005). Immigration statistics suggest nearly two-thirds (65 percent) of principal applicants approved for residence in 2002/2003 had previously held a student, work or visitor visa at some point since July 1997. Hence routes should not be seen in isolation but as interconnecting with other forms. For example, studying within a country may lead to working within that country, and perhaps marrying a citizen from the host country, which may prompt further forms of relationship migration, such as family reunion. Similarly, with the greater number of transnational companies there are more transnational transfers, and organisational migration at a particular career stage may lead to a later decision to settle permanently or retire in a particular country or region. Family migration, as with all migration, involves fluid and overlapping categories, making tight typologies difficult (Kofman 2004: 246).

Table One: Residency approvals by category 1999-2004 (Source: Statistics New Zealand 2004a, Table 11.02).

Category	Year Ended December					
	1999	2000	2001	2002	2003	2004
General Skills	14,398	19,075	31,015	29,630	20,516	8,229
Skilled Migrant	7,516
Family	12,915	13,941	15,965	12,663	14,608	13,406
Marriage	5,582	5,792	6,473	5,203	6,430	2,440
Parent	3,570	4,041	4,724	2,431	2,273	2,761
Child	1,168	994	1,131	1,283	1,312	1,363
Humanitarian	1,438	2,029	2,264	1,902	381	267
Other	1,157	1,085	1,373	1,844	4,212	6,575
Employees of Businesses	2	18	49	48	19	10
Entrepreneur Category	20	26	69	150	801	1,609
Investor / Business Investor	305	869	4,077	4,130	2,573	1,633
Refugee	1,944	1,635	1,395	1,531	1,079	1,338
Samoan Quota	1,024	1,444	1,069	403	343	613
Other	381	583	475	262	3,483	1,838
Total	30,989	37,591	54,114	48,817	43,422	36,192

Table One gives an overview of residency approvals 1999-2004, showing migration through the various economic, safety and relationship routes.

2.1 ECONOMIC OPPORTUNITY MIGRATION

Under the General Skilled Category there was an average of 2.5 people approved per application, while there was an average of 3.3 people per Business Category residence application.

There are routes for both skilled and unskilled entry in the form of temporary admission visas that, unlike permanent residency, have a limited duration and restrict access to benefits and to sponsoring others (DeVoretz 1999). The Long Term Business Visa (granted to 3,138 people in 2002/2003) is a temporary immigration category, which subsequently allows individuals to apply for residency through the Entrepreneur Category. Short-term work visas are also stepping-stones to residency. Between 1999 and 2004, the number of short-term work visas issued rose from 45,507 to 107,057 (Statistics New Zealand 2004a, Table 12.01). Over this period, those from Great Britain consistently accounted for over a quarter of work permits granted.

Table Two: Number of work permits granted during 2004 (Source: Statistics New Zealand 2004a, Table 12.01).

Country of Origin	Year Ending December 2004
Great Britain	25,451
China	8,663
Japan	7,798
India	6,098
United States	5,915
Korea	4,762
South Africa	4,638
Ireland	3,402
Canada	3,395

Until 1987, data on migrants was recorded for two separate groups – permanent and long-term migrants. After 1987, information was captured for total permanent and long-term (PLT) migrants. More recently there has been growing interest in differentiating these two groups and from July 2003 Statistics New Zealand began to identify permanent arrivals separately from long-term arrivals. In the three months ended September 2003, there were 15,700 non-New Zealand PLTS arrivals. Of these, 8,400 were long-term visitors and 6,600 were permanent migrants.¹

There has been a growth in the number of student visas issued over the past decade. During 1999, 29,604 student permits were issued, rising to 110,072 in 2004 (which was itself down 8 percent on the peak of 2003).

Table Three: Student permits issued (Source: Statistics New Zealand 2004a, Table 12.02).

Country of Origin	Year Ended December	
	1999	2004
China	4,211	55,942
Korea	3,686	15,207
Japan	3,888	5,187
USA	1,121	3,034
India	233	3,015
Thailand	1,808	2,650

¹ Permanent and long-term (PLT) arrivals include people who arrive in New Zealand intending to stay for a period of 12 months or more (or permanently). The group includes people with New Zealand residence as well as students and holders of work permits.

2.2 SAFETY MIGRATION

Safety migration consists of New Zealand's annual UNHCR refugee quota, and residency approvals for asylum seekers. Between 1979 and 2005, 19,037 quota refugees were admitted, with numbers running at around 600-800 per year. The composition of New Zealand's quota intake has changed considerably in recent decades. Whereas through the 1980s quota refugees came predominantly from Kampuchea, Vietnam and Laos, from the 1990s countries with the highest quota refugees were Iraq, Iran, Somalia, Ethiopia, and Sudan (NZIS 2005b). This refugee quota allows entry under a number of categories: medical/disability, protection, women at risk, family reunion, and emergency. On average, there were two persons arriving per quota application. Quota refugees may be followed by family reunion.

In the financial year 2002/2003 there were 713 successful refugee claims for those seeking asylum with an average of two people per successful approval.

2.3 RELATIONSHIP MIGRATION

Relationship migration incorporates different migration forms on grounds of blood, marriage and adoption, including marriage migration, correspondence brides, inter-country adoption, and sponsorship of family and parents. International marriages between citizens and non-citizens are a result of international mobility (both short and long-term), but also arise from second-generation relations between countries (Bacas 2002).

From October 2001, there were attempts to recognise diverse family structures within Family Sponsored (and International/Humanitarian) Streams. In 2001 the definition of dependent children was expanded and new policy provisions for adult siblings and adult children were introduced. Sponsorship policy also changed, whereby less dependent relatives could not be sponsored for three years post residence approval. This resulted in a large decline in the flow of Family – Parent applications.

Great Britain is the largest source of approvals through the Family Category, accounting for 44 percent of all approvals through Family De-facto and Same Sex sub-categories. The next highest contributors under this category were China, Fiji and India. Great Britain was also the largest source country of Family – Parent, followed by India, China, and Fiji (The Humanitarian Category of Family Sponsorship is now closed).

2.4 SOURCES OF MIGRATION TO NEW ZEALAND

In financial year 2003/2004 overall residency approvals were made up of Great Britain (21 percent), China (12 percent), and India (8 percent) (NZIS 2004a). Current migration to New Zealand is from a wider range of source countries than in the past and includes increased numbers from Asia, the Middle East and Africa.

Table Four: Immigrants (excluding returning New Zealanders by major source): major traditional and non-traditional sources (Source: Bedford et al 2002, p. 78).

	1982-86	1987-91	1992-96	1997-01
Total number	91,723	124,186	189,349	215,020
Traditional sources %				
Australia/UK	51.7	38.3	26.2	25.4
Other	31.5	27.8	14.9	16.2
Non-traditional sources %				
Asia	12.9	28.8	47.0	46.0
Other	3.3	4.7	11.8	12.5

Table Four shows the change in sources of immigration over the last 20 years. Australia has declined steadily as a source of arrivals over recent years and there has been a rise in non-traditional sources, particularly from Asia.

An increasing percentage of New Zealand's population is born overseas, rising steadily from 527,337 or just under 16 percent of the total population in 1991, to 605,061 or 17.55 percent of the population in 1996, and to 698,628, around 19.5 percent of the population in 2001. A detailed breakdown of country of birth for 2001 is shown in Table Five.

Table Five: Birthplace of New Zealand residents (Source: Statistics New Zealand 2001).

Country of Birth	Number	Percentage of New Zealand Population
Oceania	174,252	4.7
Australia	56,142	1.5
Cook Islands	15,222	0.4
Fiji	25,722	0.7
Samoa	47,118	1.3
Tonga	18,054	0.5
Asia	165,774	4.4
China, People's Republic	38,949	1.0
Hong Kong	11,301	0.3
India	20,892	0.6
Korea, Republic of	17,934	0.5
Malaysia	11,460	0.3
Taiwan	12,486	0.3
Europe	284,670	7.6
Netherlands	22,242	0.6
United Kingdom and Ireland	225,123	6.0
Americas	25,509	0.7
United States	13,347	0.4
Africa and Middle East	48,387	1.3
South Africa	26,061	0.7
Overseas-born	698,628	18.7
New Zealand-born	2,890,869	77.4
Not stated	147,780	4.0
Total	3,737,277	100.0

Those from Sub-Saharan Africa are the fastest growing group, rising from 17,445 in 1996 to 36,213 in 2001. The greatest growth was for China, South Africa, India, Fiji, Korea, Samoa and Tonga. The proportion of population born in some overseas countries fell between 1996-2001, including the Netherlands, Malaysia, Hong Kong and the United Kingdom (Statistics New Zealand 2001).

Of the 2001 overseas-born population, 59.2 percent had been resident for more than 20 years, 27.5 percent for less than five years, and 7.5 percent for less than one year. Those from the United Kingdom and Pacific were more likely to have been in New Zealand for more than 10 years, and those from North-East Asia and North Africa, for less than five years. The overseas born have an older age profile than the New Zealand born population, although age profiles reflect the particular reasons for migration (economic, relationship or safety).

2.5 SUMMARY

- > A large number and growing proportion of the New Zealand population is overseas born.
- > Diversity of population flows, including greater numbers from areas of North-East Asia, South-East Asia, and South Asia, Middle-East and Sub Saharan Africa.
- > Relatively large flows continue from traditional source countries of Britain (and to a lesser extent USA and Canada).
- > Changing ethnicity of the New Zealand population, including a growing proportion of those with Pacific heritage who are New Zealand born, and a growing proportion of those with Asian ethnicities who are 1.5 and second generation. By 2021 the Pacific population will number over 400,000, and the Asian population is projected to be 600,000.

3.0 HOW 'KIWIS' SEE THE WORLD

New Zealanders themselves have always been a mobile people. Glass and Choy (2001:21) suggest that New Zealand has, over the 47 years to 2001, lost almost 484,000 New Zealanders overseas. While these losses are compensated for by gains – 81,159 from Australia and 676,257 from elsewhere over the same period – such 'exchanges' (cf. Didham and Bedford 2004) create another dimension of transnational families, with 'stretched' families being created by this Kiwi diaspora. When talking about migration it is also important not to overlook return migration and on-migration (Fletcher 1999) and this section explores four main flows:

- > Departure of New Zealanders.
- > Return of New Zealanders.
- > Departure of non-New Zealanders.
- > Return of non-New Zealanders.

3.1 NEW ZEALANDERS DEPART

It must be noted at the onset that the terminology of 'New Zealander' or the label of 'Kiwi' is itself inherently problematic, frequently conflating country of birth, passport status, citizenship, residency, ethnicity and identity. Not all discussions, for example, manage the same clarity around categories as Bryant and Law (2004: 2):

We treat a person as belonging to the New Zealand diaspora if the person was born in New Zealand but is resident in another country at the time of the other country's census. This means defining a person as 'New Zealander' if, and only if, that person was born in New Zealand.

There is a steady stream of New Zealand citizens departing for overseas although there is some volatility across particular years. This is shown in Table Six.

Table Six: Departures of New Zealand Citizens (Source: Statistics New Zealand 2004a, Table 9.10).

Year Ending December	Departures
1988	58,017
1989	49,670
1990	35,959
1991	30,603
1992	30,808
1993	30,440
1994	34,008
1995	37,418
1996	40,743
1997	44,273
1998	48,273
1999	53,215
2000	58,680
2001	56,031
2002	42,112
2003	38,859

There has been a steady increase in the net outflow of New Zealand citizens between 1995 and 2000 (up from 14,100 to 37,900). Between 1997 and 2001, 48.6 percent of permanent and long-term departures went to Australia; 23.6 percent to the UK/Ireland; 11.9 percent to other destinations; and 13.3 percent to what are known as non-traditional destinations. Glass and Choy (2001) note it tends to be younger New Zealanders who leave (and who are replaced by adult non-New Zealand citizens within inward flows). In 2003 the outflow was greatest for those aged 20-24, and in the 25-29 group

there were more males than females departing, which contributed to a gender imbalance within this age group.

Table Seven shows the destinations of departing New Zealand citizens in the year ending 2004.

Table Seven: Permanent and long-term departures of New Zealand citizens for year ending December 2004 (Source: Statistics New Zealand 2004a, Table 9.06).

Destination	NZ citizens
	%
Australia	59
United Kingdom	20
Other	21

The differences in defining a 'New Zealander' result in diverging estimates of the size of the diaspora. Walrond (2005) suggests there are 800,000 'Kiwis' overseas, of whom 500,000 are New Zealanders by birth and 300,000 are children of these New Zealanders. Such children would be entitled to New Zealand citizenship but may or may not take advantage of it, and indeed may or may not visit New Zealand during their lifetime. Further estimates put the 'expatriate population overseas' at 600,000-700,000 (Bedford 2001), while others 'round' the figure up to one million (Sweeney 2002). Perhaps the most comprehensive discussion of New Zealanders overseas is the Treasury Paper which identifies the number of New Zealand born persons residing overseas (Bryant and Law 2004). The major countries of residence for New Zealand-born persons now living overseas is shown in Table Eight.

Table Eight: New Zealand born persons living overseas (Source: Bryant and Law 2004).

Country of Residence	Number of
	New Zealanders
Australia	355,765
Canada	9,475
Netherlands	4,260
United States	22,872
United Kingdom	58,286
Total outside New Zealand but born there	459, 322

Most of New Zealand's diaspora is concentrated in Australia and historically many trans-Tasman migrants have not seen their movements as permanent (Pool 1980: 11; Belich 2001). Since the 1960s inflows and outflows to Australia have increased rapidly and become increasingly one-sided (Carmichael 1993), and overall there are now eight times the number of New Zealand citizens in Australia than vice versa (Birrell and Rapson 2001). Of the total number of New Zealand citizens living in Australia, there are around 90,000 New Zealand Maori in Australia (Bedford et al 2005), with suggestions that 16 percent of Maori overall may live overseas.

Estimates put the 'New Zealanders' in the UK at between 50,000 and 200,000. The British Home Office in 2003 reported that about 400,000 New Zealanders had British passports and in 2004 a majority of New Zealanders had patriality (a UK parent or grandparent) and could live and work there for four years and then apply for citizenship (Walrond 2005). Whether becoming a British citizen changes the ethnicity and identity of such 'Kiwis' is not clear, but return to New Zealand always remains an option. Thus as Glass and Choy (2001: 13) note:

The question is whether we should care about New Zealand *citizens* regardless of where in the world they are located, or only about *residents* in New Zealand. This can have implications on how we perceive the brain drain concern and thus, whether and how we should respond. [italics in original]

3.2 NEW ZEALANDERS RETURN

Each year there is a consistent return of New Zealand citizens from overseas (around 22,000-25,000)² and in 2003 there was a net gain of 6,200 New Zealand citizens. The flow is consistent and seems to be unrelated to economic circumstances (Department of Labour 2002). In 2004, 70 percent of New Zealand nationals returning to New Zealand were from Australia and the UK. While the bulge in departures from New Zealand is for those aged 20-29, a large number of returns to New Zealand are aged 25-34 (Statistics New Zealand 2004a, Table 9.02). It is worth noting the general shift towards later marriage and childbearing in New Zealand, and that many returnees will likely return with non-New Zealand citizens as partners.

There is growing academic interest in the notion of return, and anticipation that over the next 50 years increasing numbers of people will return to their country of origin (Bedford et al 2002). Given that New Zealand's diaspora is ageing, this may have important implications. Traditionally, those returning from across the Tasman are in their 40s and 50s, while those returning from OE in Europe tend to be younger, a reflection of the visa status required for the latter (Bedford et al 2002). An 'Age of Return Migration' may also result in new re-migration patterns and age profiles.

3.3 NON-NEW ZEALAND CITIZENS DEPART

There has been a steady upwards rise in the number of non-New Zealand citizens leaving New Zealand³, as shown in Table Nine.

Table Nine: Departures (Source: Statistics New Zealand 2004a, Table 9.01).

Year Ending December	Departures
1995	11,659
1996	13,469
1997	15,739
1998	16,212
1999	15,557
2000	15,626
2001	15,337
2002	15,641
2003	18,895

During 2004 departures continued to increase, rising to 22,200 and prompting concerns about the loss of skilled migrants. For the year ending 2003, 17 percent of non-New Zealand citizens departing New Zealand left for Australia, 16 percent for the UK, and 67 percent for other destinations.

As Table 10 suggests, there are some countries where the flows are dominated by departures and others by arrivals. All show exchanges in both directions.

Table 10: Permanent and Long-term migration by next and last country, year to December 2004 (Source: Statistics New Zealand 2004a, Table 9.05).

Country	Arrivals	Departures	Net
Australia	14,216	28,938	-14,722
UK	20,981	11,962	9,019
China	6,143	3,319	2,824
Japan	3,802	1,836	1,966
India	3,052	603	2,449
United States	3,451	2,331	1,120
Canada	1,505	1,247	258

New Zealand data suggests that of 27,338 people who were approved for residence in 1998, 97 percent arrived to take up residence or were approved on shore. By 2003, 25 percent of people were absent, 19 percent had been absent for six months or more, and 16 percent had been absent for one year or more (NZIS 2003).

² Defined as New Zealand citizens returning after an absence of 12 months or more.

³ Defined as non-New Zealand citizens departing from New Zealand after a stay of 12 months or more.

Those from Singapore, Taiwan and the United States had relatively high absence rates compared with other countries, and there were high rates of absenteeism for Business Investors, General Skills Category, Family – Parent and Family – Child Dependent (NZIS 2003).

There is growing interest in whether some groups that migrate to New Zealand are then more likely to return to their country of origin, or perhaps to on-migrate to a third country. In recent years, increasing numbers of New Zealanders leaving for Australia were not New Zealand born, prompting some concern about ‘backdoor’ entry to Australia and leading to a change in Australian policy so that only permanent residents can avail themselves of full social security eligibility (Birrell and Rapson 2001; Bedford et al 2003).

3.4 NON-NEW ZEALAND CITIZENS RETURN?

The final flow to highlight concerns the return of non-New Zealand born residents and citizens. For example, those migrating to New Zealand perhaps on-migrate to a third country and then return to New Zealand for periods or perhaps ‘permanently’ at points in their life course. It is difficult to collect data on this life cycle movement because it is beyond such episodic flows of departures and returns. It is interesting to note the Longitudinal Immigration Survey pilot (NZIS 2004a) reporting that 10 percent of permanent residents arriving in New Zealand said they intended to maintain dual residence, ie live in New Zealand and another place for part of the time. That is, they planned to be ‘transnationals’, and of those, half of those planned to do so for five years or more.

Just as absence from New Zealand does not necessarily mean a failure to settle, neither does it preclude a later return to New Zealand. International labour markets and family ties mean that people may circulate more globally and this presents a challenge to a range of social science disciplines.

3.5 SUMMARY

- > As many as 20 percent of all New Zealand citizens could be living overseas (particularly in Australia and the UK).
- > There is a continuous flow of returning New Zealand citizens.
- > There has been a rise in the number of non-New Zealand citizens departing New Zealand.

4.0 TALKING TRANSNATIONALLY

While contemporary transnationalism is grounded in global processes of economic, social, demographic, political and technological change, it is distinct from globalisation, which emphasises the de-centring effect of 'forces' that lie outside nation-state boundaries. Transnationalism on the other hand evokes a linkage, or to use the more common metaphor, a network of relationships that span two or more nation states. While globalisation highlights macro level processes and the erosion of state power, transnationalism points to the variable, innovative and micro-level strands that people forge across space and place. As Pries' (2001: 5) juxtaposition of globalisation and transnationalism suggests:

Besides the political, economic, ecological and cultural weakening of the nation-state and the national society there are genuine social relations and social spaces that cross national borders.

Transnationalism focuses investigation on the social relations that involve persons, networks and organisations across the borders (Faist 1999: 2; also Vertovec 1999: 447). While 'diaspora' refers to a mental state of belonging, with physical movements occurring many generations previously, transnationalism is concerned with present-day movements across national boundaries (Olwig 2002: 216). These movements across borders are multiple, regular, routine and simultaneous (Glick Schiller et al 1995: 48; Basch et al 1997: 4; Portes et al 1999).

For Glick Schiller et al (1995: 48) transnationals are embedded in two places:

They settle and become incorporated in the economic and political institutions, localities, and patterns of life in the country in which they reside. However, at the very same time, they are engaged elsewhere in the sense that they maintain connections, build institutions, conduct transactions, and influence local and national events in the countries from which they emigrated.

Such social fields may cross geographic, cultural, and political borders (Basch et al 1997: 7). While transnationalism has existed in different forms for a long time (cf. Spoonley et al 2003), it has intensified under contemporary conditions.

Developments that facilitate and intensify such transnational ties include the availability and cost of long-haul air flights, and communications technology (telephone, facsimile, electronic mail) (Glick Schiller et al 1995; Portes 1997; Portes et al 1999; Kennedy and Roudometof 2001; Vertovec 2002; Schmalzbauer 2004; Spoonley and Macpherson 2004; Vertovec 2004). Together these technological innovations have contributed to the shrinkage of time-space and to networking a global-local world (Giddens 1991; Castells 1996).

There is a burgeoning literature seeking to theorise transnationalism (cf. Glick Schiller et al 1995; Portes 1997; Portes et al 1999; Vertovec, 1999; Faist 2000; Kennedy and Roudometof, 2001; Portes, 2003; Vertovec, 2003; Jackson et al 2004). More broadly, social and political theorists identify transnationalism as a central concept within a flexible citizenship (Ong 1999), cosmopolitan citizenship (Delanty 2000), and even transnational citizenship (Bauböck 1994).

4.1 A NEW LANGUAGE OF MIGRATION

Transnationalism has challenged thinking across a number of fields of inquiry, including migration. Increasingly, a new 'mobility and movement' has been seen as going beyond the settler-immigrant paradigm of 'Point A to Point B' (Bedford 2001; Vertovec 2002; Alexander 2005: 653). As Baldassar et al (1999) note:

International migration is not an event that ends at settlement, but a life-long process of complex interactions between individuals and groups who often live far apart.

Tried and trusted categories have become increasingly unstable, hyphenated and contested. A traditional language of migration is giving way to an emerging transnational vocabulary.

The traditional language of migration

Assimilation, separation, integration, home, host, arrival departure, acculturation, settler, settlement, return, origin, reception, exile, sending, receiving, immigrants.

The emerging vocabulary of transnationalism

A language that is being spoken includes concepts of: 'simultaneity', intracorporates, cosmonauts, astronauts, parachute kids, sojourners, returnees, commuting migrants, circulators, serial migrants, international circulators, those living bi or multi-local lives, multi-nuclear families, bridgehead communities, meta-societies, hyphenated citizens, re-migrants, on-migrants, double returnees, reverse astronauts, expatriates, shadow households, 'other mothers', multinational families, rotational migrants, pendulum migrants, living together apart.

Transnational families fit within this discussion of transnationalism because they also involve regular exchanges which are played out in everyday lives. Technology is an important consideration for transnational family formation and maintenance, assisting, for example, in economic exchange and the search for employment opportunities, and allowing intimate exchange such as migrants maintaining contact with relatives overseas, and 'intensifying' correspondence marriages (Constable 2003). Technology also provides opportunities for inter-country adoptees and biological families to find and meet each other (Kim 2003).

A review of the transnational literature points to some key issues that inform a consideration of transnational families:

- > *Transnationalism has traditionally emphasised macro and typically economic processes.*

However, more recently a 'transnationalism from below' has begun to redress this imbalance, including the use of qualitative methodologies, life histories and ethnographic approaches to explore the linkages and exchange networks at micro and meso levels.

- > *The transnational literature highlights the possibilities and ease of movement.*

It has had less to say on the difficulties distance may create in terms of restriction and costs. But as Foner (1997) notes:

Some groups [and we may add, places] are likely to be more transnational than others – and we need research that explores and explains the difference. Within immigrant groups, there is also variation in the frequency, depth and range of trans-national ties (p 456).

It is important not to overlook that for some (perhaps many) the ability to travel is limited and in theorising transnational families mobility and immobility are important considerations (see also Bacas 2002: 9). The type of support that can be provided across boundaries, including personal care of elderly relatives or childcare provided by grandparents, is constrained. Such difficulties are further exacerbated by the realities of domestic social policy.

- > *A celebration of transnationalism*

Recognition of transnationalism's opportunities must be balanced with awareness that not all choices are freely made. Not all transnationalism is elite transnationalism in pursuit of career and educational opportunities as opposed to simply making a living (Hondagneu-Sotelo and Avila, 1997; Schmalzbauer 2004: 18). As one writer notes:

any attempts to romanticise these family separations in the context of transnational conceptualisations should be tempered by the numerous costs and the anxiety, dislocation and alienation that these separations often produce (Menjívar 2002).

> *Transnationalism cannot ignore structural divisions*

When considering transnationalism it is important to recognise structural divisions and how families vary by race, ethnicity, gender, class, and nation (Bjerén 1997: 223; Hondagneu-Sotelo and Avila 1997; Fouron and Glick Schiller 2001; Bacas 2002; Kofman 2004: 246; Panagakos 2004: 300; Wall and São José 2004; Zontini 2004).

> *A fuller transnationalism should focus on a range of groups*

A discussion of transnationalism should include older established migrant groups, as well as New Zealanders travelling outside New Zealand. This re-averts a gaze that is solely on 'new immigrants' to all migrants whilst recognising the structural divisions within them (cf. Kennedy and Roudometof 2001).

> *Associating the family with the private and intimate realms results in transnational families being under-explored*

An emphasis on individuals, prizing macro economic consideration, and gender-blindness, all contribute to the relative invisibility of family-related migration and transnational family relations (Kofman 2004: 243; cf. also, Boyd 1989). A focus on productive work can elide what is 'the graft and craft' of kin work and caring work (including parenting and elder care). As Zontini (2004) writes:

transnationalism forces us to reconsider our understanding of households and families based on the idea of co-residency and physical unity and to take into account the possibility of spatial separation (p 1,114).

> *There is a danger of transnationalism being defined in overly economic terms*

For example, Portes et al (1999) note the transnational research field is:

composed of a growing number of persons who live dual lives: speaking two languages, having homes in two countries, and making a living through continuous regular contact across national borders (p 217).

This is too restrictive and transnational communities vary in scope from simply keeping in touch to heavy exchanges of information, goods and people. Families will show similar diversity with not all engaged in frequent travel to and from countries. Family identity will also be maintained through nurturing networks from a distance, and perhaps across several countries (Zontini 2004: 1129). Such 'emotional transnationalism' (Wolf 2002, cited in Lee 2004) requires better understanding.

> *Transnationalism cannot ignore the state and domestic social policy*

Quite simply, national social policy impacts on the possibilities afforded to transnational families. The call to reinsert geography, state boundaries, and distance back into transnational debates is crucial (cf. Mitchell 1997; Willis et al 2002).

4.2 FORMING TRANSNATIONAL FAMILIES

Transnational families are formed and shaped in ways that include:

- > Families as migration units.
- > Chain migration.
- > Family reunions and sponsorship (includes marriage and sponsorship).

This said, the evolving natures of transnational families make them resistant to tight typologies.

4.3 FAMILIES AS MIGRATION UNITS

Transnational families form when individuals or family groups choose to migrate. Individuals may leave family members (siblings, non-dependent children, parents) in their country of origin. Similarly, family units that migrate to New Zealand (for example, a 'nuclear' family of parent/s and dependent children) may also leave family in the country of origin – including parents, grandparents, siblings, aunts and uncles.

There is an international literature around the separation of dependent children and their parents (cf. Parreñas 2005). Hondagneu-Sotelo and Avila (1997) for example talk of 'transnational motherhood' with women working as nannies or housekeepers while children remain in countries of origin. The children that are left behind are cared for by grandmothers, female kin, fathers and paid carers (so-called 'other-mothers'). (Section Five deals with the astronaut /cosmonaut phenomenon in relation to New Zealand).

Transnational families are also created by the emigration of adult workers leaving older family members such as parents in countries of origin, and the relationship between adult children and their parents is a central one of transnationalism. Zontini (2004) notes how remittances may be provided from Filipino women, with some supporting elderly parents where no welfare system exists (cf. also Izuhura and Shibata 2002). There is also an emerging trend for Filipino grandparents to be brought over to European cities to look after children while mothers continue to work (Zontini 2004).

Distance does not weaken support to a parent and may include regular and one-off remittances, including payments for parents' nursing care (Izuhura and Shibata 2002). However, the meaning of family may change with the death of one or more parents (Baldock 2000).

4.4 CHAIN MIGRATION

Chain migration is when a member of a family sponsors or supports extended family members to join them in countries of migration. This may help create new transnational families, if, for example, a parent moves for work facilitated by networks of other family members but initially leaves their own spouse and children in the country of origin. In this way families are stretched over borders. If chain migration continues over time it may serve to eliminate a transnational family by locating all the members of a family network in one country.⁴

4.5 FAMILY REUNIONS AND SPONSORSHIP

Transnational family structures may change through processes of family reunion and sponsorship. During the 1990s there was increased Family and Humanitarian Category migration: in 1993 there were 6,160 social migrants approved and by 1998 this figure was 12,933 (60 percent of all applications), (Brinsdon 1999).

4 Many that migrate to New Zealand do have pre-existing family ties here that were not part of the approval unit for the household: 49 percent of Family and International migrants did, and 28 percent of Skilled and Business migrants (NZIS, 2004a, p 37).

Transnational families may be created by spouse migration within reunification and sponsorship streams. There are various ways that such unions may take place – including residents sponsoring their spouse/prospective spouse who they have met in New Zealand or abroad, seeking marriage partners abroad (so called ‘correspondence brides’), marriage migration between persons of the same ethnic background (culture and religion), and also second generation migrants seeking partners from the parent’s country of origin (cf. Khoo 2001). Bacas (2002) explores issues around German women marrying Greeks and settling in Greece, and Panagakos (2004) identifies Greek transnational families involving second-generation Greek women seeking Greek partners. International literature has suggested that the Vietnamese diaspora return to Vietnam to marry, and South-Asian arranged marriages across Britain and South-East Asian countries are well documented (Bacas 2002; Thai 2003; also Charsley 2005). High migration from countries at one point in time can have downstream effects of higher numbers of spouses being sought from countries of origin at a later point through sponsorship. High refugee numbers at one point may also have a similar downstream effect (Khoo, 2001: 122). Transnational families may also be created by the delays in approving the family sponsorship stream, generating a form of ‘forced’ transnationalism.

Sponsorship can also be seen in inter-country adoption, and particularly since the 1970s there has been a rise in inter-country adoption internationally (cf. Selman 2002). There was an acceleration of inter-country adoption to New Zealand during the 1990s with adoption from Romania, and later, Russia and China. Up to 1990, 157 Romanian children had been adopted into New Zealand families, and over the past 13 years there have been a total of 597 Russian adoptees. Currently there are around 40 inter-country adoptions a year organised through the non-statutory ICANZ organisation, and about 30 children are adopted from China each year under the supervision of CYF, as well as a small number of children from the Philippines, India and Hong Kong. Some 200 Samoan children aged under 14 years of age are also adopted annually by New Zealand families.

4.6 THE KALEIDOSCOPE OF TRANSNATIONAL FAMILIES

Transnational terminology and conceptualisation moves beyond a focus on arrival and departure to explore ‘newer’ forms of mobility and family formation as continuous processes.

A methodological approach is required that can fully comprehend these changes and can supplement the interest in categories of ‘origin’, ‘birth’, ‘location’, ‘departure’, ‘resident’, and ‘citizen’. The incorporation of the life course and intergenerational cycles allows different ways of posing important questions around transnationalism. Previously ‘place’ was most significant and questions typically asked about how long since someone had left a particular country and resided in New Zealand: in effect undertaking a spatial-temporal cross-check. Adding the life course and intergenerational cycles offers new ways of plotting mobility. This includes stages in a work career or in family formation: students recently graduated, professionals having children, early career workers, experienced workers, young leaving on their OE, early retirees, new grandparents, and later retirees. The precise meanings of such points in the life course are influenced by: technology, demographic trends, and social attitudes, as well as being shaped by gender, income and education. Theorising the life course and generation cycles against maps of mobility is a potentially powerful approach to understanding transnational families.

The suggestion here is to use a range of wide lenses to consider transnational family issues: nation-specific discussion; categories of migration; and life course, generation cycle, and personal biography. Individually, each lens identifies an important dimension. These lenses are most illuminating when they are overlaid and rotated in a ‘kaleidoscope effect’.

Macro: A Nation-specific lens recognises that migrants arrive in New Zealand *from* a range of source countries, and that New Zealanders *depart* to a range of countries. Such a lens identifies nationality, residency, citizenship and ethnicity, and the focus produces a series of bilateral linkages (eg Chinese *in* New Zealand, New Zealanders *in* Britain, Samoan-born *within* New Zealand), or trilateral linkages (eg Hong Kong Chinese migrants to New Zealand, who receive New Zealand citizenship and then onward migrate to a third country).

Macro: Migration categories recognise that people obtain residency for a range of reasons – for example as skilled labour, as investors, as refugees, and through marriage or family circumstance including transnational adoption. Acknowledging categories maintains a focus on immigration policy and structural inequality, retaining awareness that economic, social and cultural opportunities are more likely to be fostered by some routes than others.

Meso/micro: Stage in life course and point in the generation cycle considers personal and familial biographies. This involves a series of relational encounters amongst individuals living particular lives. It considers, for example, whether individuals are completing education, partnering, raising children, educating children, balancing work-life demands of family and transnational family, or retiring. The life course (eg ageing) is socially shaped, and structural dynamics of gender, ethnicity, education, income, and family circumstance also operate. For example, the age of a child and the stage they are at in their schooling is important in helping explain mobility and immobility.

The generation cycle is also crucial. Intergenerational links may increase the incidence of return migration in later-life of dual earner households (Bailey et al 2004). It entails thinking about the relationships of care tasks and obligations involved for parents, children and family members. This may encompass a consideration of the care of parents, whether adults move to be with parents, and whether parents move to be with children. As Kofman (2004) notes:

Processes involve different members of the family, namely children, spouses and the elderly, during important stages in the life cycle such as adulthood, marriage and retirement, and changing gender and generational relations (p 250).

There are key issues, for example, around the mobility of 1.5 and second-generation migrants and return to countries of origin.

Using these lenses singularly presents a series of clear but somewhat ‘still’ pictures. Switching rapidly between ‘frames’ does not add much to our understanding. Overlaid, however, they are powerful and when used kaleidoscopically enable a crucial dynamism within the methodology. The kaleidoscope is inclusive of diverse transnational family scenarios: unskilled and highly skilled, young and old, traditional and newer geographical migration patterns, social and economic migration, men and women, elite and disadvantaged. It acknowledges a range of forms and functions, which may be discussed frequently (eg remittances), and where there are gaps in understanding such as the portability of what are essentially ‘emotional assets’ (flows of emotion, affinity and obligation).

A detailed focus on particular cases is strengthened by the possibility of thinking of changes *through* time, as the kaleidoscope is turned to refract new interplays of country of birth, origin, departure, immigration categories, personal and household circumstances, and new attitudes to identity, life course and generational positioning. Thus, children become parents; workers become retired; first generation become second generation, and so on.

4.7 SUMMARY

- > There is an emerging language of transnationalism focused on mobility and hybridity.
- > Transnational families are formed and shaped in ways that include families as migration units, chain migration, and family reunions and sponsorship (including marriage and sponsorship).
- > A fuller study of transnationalism must encompass issues around transnational families, recognising the variety of circumstances and the structural inequalities amongst groups.
- > Transnational families bring forth a range of policy dilemmas.
- > The ‘kaleidoscope’ approach may be fruitful for exploring transnational families.

5.0 ADDING IT UP: NEW ZEALAND STATISTICS AND RESEARCH

This section brings together evidence and discussion around New Zealand's transnational families. At the onset it should be stated that there is no comprehensive data set that can provide an overview of the breadth of transnational families within New Zealand. Data reported in Section Two and Section Three of inflows and outflows points to types of transnational *communities* more so than transnational families (cf. Parr et al 2000). As should be expected with a *national* Census, the Census retains a focus within the geographical boundaries of New Zealand, and there has not been a representative study that describes the scope and occurrence of transnational families. A fuller understanding would not only describe the breadth and occurrence of transnational families, but could also provide information on the depth and texture of transnational families within New Zealand. There are, however, numerous migration and settlement studies using survey and qualitative approaches that offer insights into New Zealand's transnational families and the relations of parents, children and siblings across national boundaries. This section is an attempt to synthesise such completed and ongoing research, hoping to shed light on transnational families in New Zealand.

5.1 RESEARCH ON NEW MIGRANTS

The New Settlers Programme at Massey University was a longitudinal study that explored three groups of settler families from the People's Republic of China, India and South Africa. The programme focused on dimensions that included the new settler, the host society context, and the wider immigration experience. Transnational family relationships were not an explicit focus of the programme, although one discussion (Trlin et al 2001) does suggest migrants maintain high levels of contact with friends and relatives abroad, including visits to countries of origin. Visits were particularly high for South African migrants, while levels of telephone, letter and email contact were high for all groups.

The New Zealand Immigration Service is currently conducting a Longitudinal Immigration Survey (2005-09) with interviews conducted with migrants at six, 18, and 36 months after residence has been taken up. The interviewee population includes Principal Applicants and non-Principal Applicants from the issue of residence permits and will encompass economic and social immigration streams, but not refugees. The survey's main focus is to provide data on the settlement experiences of migrants and the outcomes of immigration policies, producing information around unmet need for government and community health and social services (NZIS 2004a & b). The study may generate material of interest to the study of transnational families, by including information on those whose residency was approved as part of an application, but who do not take up residency (thereby allowing further investigation of the astronaut/cosmonaut phenomenon).

There are gaps in our knowledge of how long people arriving in New Zealand stay on for (Glass and Choy 2001: 20). Although participants of the Immigration Service's longitudinal study who move from New Zealand (either return to country of origin or on-migrate to a third country) will not be followed-up, data collected up to that point on these subsequent 'movers' may suggest particular things about settlement experience, plans and difficulties, including a better understanding of 'non-settlement' and mobility. There are already some interesting results from the pilot study with it suggesting, for example, that after poor employment opportunities, distance from home and family was the second thing migrants most disliked about New Zealand (NZIS 2004a: 123). The early pilot data also generates information in relation to assets owned overseas by applicants, which may point to transnational lifestyles (see Table 11).

Table Eleven: Overseas assets by category of migrants (Source: NZIS 2004a, Table 6.31).

Assets Overseas	Skilled and Business Principals	Skilled and Business Secondaries	Family and International Category Migrants	Total
Financial ⁵	29	16	8	17
Property	22	19	15	18
No assets overseas	55	71	77	69
Unspecified	3	2	1	2

At the University of Waikato, the Migration Research Group under its New Demographic Directions Programme (1996-2004), has undertaken studies on the migration of families from North-East Asia, including those from China, Hong Kong, Taiwan and Korea (Lidgard 1996; Bedford and Lidgard 1996; Bedford et al 1997; Ho et al 1997; Lidgard et al 1998a & b; Ho et al 2000; Ho et al 2001; Ho 2003; Ho and Bedford 2005). The research has explored the settlement experience of new migrants, and issues around employment, education and family structure. This has included an emphasis on making sense of the new patterns of work and residency of recent Asian migrants. Migration Research Group research on astronaut families has also explored the demographic characteristics of these families using Census data.

In common with overseas experience, research from the University of Waikato has suggested that many migrants from Hong Kong did not achieve the economic success they expected within New Zealand and this contributed to a re-establishment of an economic elite back in Hong Kong. Between 1991 and 2003 there was a loss of Hong Kong Chinese from New Zealand as a result of returns and onward migration (Ho 2002). Studies have explored the cosmonaut and astronaut migration phenomena, highlighting emerging patterns of return migration of the 1.5 and second generation (cf. Ho et al 2000).⁶ Authors found the incidence of astronaut families was high among Chinese immigrants from Taiwan and Hong Kong, but low for China and Korea, with key explanatory factors including the age of children and migration routes.

The astronaut/ cosmonaut issue has also attracted much interest amongst other researchers also (cf. Beal and Sos 1999), and the Immigration Service (NZIS 2000a) tracked a cohort of migrants entering New Zealand during 1997 on the General Skills and Business Categories, in order to better understand the phenomenon. They found that of two-parent families, one-third of children had been with only one parent at some point, and a quarter of children from one-parent families had been in New Zealand for some period without a parent. Yet the phenomenon is not restricted to Asian migrants. In terms of couples, about 80 percent of members of Pacific couples had spent time alone in New Zealand, compared to 24 percent of Indian couples. Three-quarters of single migrants had spent time out of New Zealand since taking up residency. There are suggestions that such astronaut strategies may be a characteristic of class rather than of ethnicity (Frieson and Ip 1997; Ip 2000).

Research on Asian migration has focused on the circulation and continuing mobility and spread of networks (Frieson and Ip 1997; Ho 2002; 2003; see also, Parr et al 2000). As Ho (2002) notes, the Asian family may be dispersing over several countries rather than residing in one place. She notes that astronaut families tend to decrease over time but this does not signal the end of mobility with, for example, younger groups of Hong Kong Chinese more mobile and dispersing over more than one country, while other, older astronauts may reunite in New Zealand or the country of origin. Similarly, Ip (2000) notes that many young ethnic Chinese return to the land of origin for employment opportunities, while parents continue to reside in New Zealand (p 13).

In Allan Bartley's (2004) study on the '1.5 Generation' of new migrants, over a quarter of survey respondents indicated a preference for remaining in New Zealand: 45 percent preferred to return to their country of origin, while one-fifth said they preferred to move to another English speaking country. If these groups do embody what he terms 'a new mode of migration', then this begs important questions around whether and how movement will continue through time and its policy implications:

One of the lingering questions about transnational migration is whether transnationalism can be sustained and reproduced generationally (Bartley 2004: 159).

⁵ Includes shares, investments, investment trusts, bonds, bank saving and deposits.

⁶ For similar Canadian experience of Hong Kong Chinese migrants see discussions by Waters 2001a & b; DeVoretz et al 2002; Ley and Kobayashi 2005).

Recent writings have moved towards recognising that stages of family formation and retirement may generate new movement patterns (cf. Ho and Bedford 2005; Ley and Kobayashi 2005; Yeoh 2005). Thus, these transnationals move to the place that suits their particular stage in the life course, related to work, education, and retirement. This entails 'a scattering of parents, siblings and children according to which station works best for their present stage' (Ley and Kobayashi 2005: 120). Whereas return migration is typically seen as closure, new patterns are understood as continuous (and imply a perspective not dissimilar to the 'kaleidoscope' of Section Four).

While recent New Zealand scholarship has focused on the return of North-East Asian migrants, given earlier predominantly British flows it is perhaps surprising that we know little about the return of British migrants to the UK. This is despite these return numbers being considerable (cf. Ip 2000); recent British immigration remains virtually unstudied in New Zealand (Belich 2001: 539). For example, Hutchings' (1999) study of 288 assisted migrants did not include those that had already returned to the UK. In relation to Australia, Appleyard (1988) suggests the remigration of the British is three times higher when compared to the non-British (6 percent as compared to 2 percent). His 1957 survey interviewed UK returnees and noted a rate of loss to the UK of 18 percent over seven years, which he attributes to non-economic decisions such as spouse 'homesickness' or the death or illness of a relative (1988: 99). Those who arrived with the largest amounts of capital were more likely to return to the UK than those with small amounts (p 104). Appleyard (1988) also notes that 68 percent of those that returned to the UK had *plans* to return to Australia at some point.

While some migrants have increasing opportunities to return or circulate, typically refugees do not. There is a range of key studies on the experience of refugee settlement experience, but perhaps less focus on distinct transnational family issues. Clearly refugees, as with all migrants groups, are not themselves a homogenous group (NZIS 2001). The circumstances of movement to New Zealand may result in families being separated outside their countries of origin, so family reunification within a safe country is vital and identified as a particularly urgent concern for women. The study *Refugee Voices* (NZIS 2004c) interviewed nearly 400 recently arrived quota, convention and reunion refugees, and also talked to established quota refugees in New Zealand for more than five years. Refugees noted that often they have a lack of understanding of family sponsored immigration policy and processes to follow (NZIS 2004c).

Families being split as a result of war, conflict and persecution may also lead to transnational family relations being fostered through remittances. There is recognition that obligations may be placed on refugees who can least afford to meet them given their reliance on state social assistance and low wages:

The separation of families between countries can also lead to financial pressures, with family members living in the host country feeling a duty to support others still living overseas (NZIS 2004c: 7).

Those from Ethiopia and Somalia may have family in refugee camps, and New Zealand family may send money and offer support to bring them to New Zealand (cf. Trlin et al 2005).

5.2 RETURN RESEARCH AND NEW ZEALANDERS

As Glass and Choy (2001: 20) note, there are also gaps in our understanding of how long departing New Zealanders remain abroad. The Migration Research Programme at the University of Waikato has undertaken survey work around return migration (Lidgard 2001; Lidgard and Gilson 2002), and is also currently undertaking research on the circulation patterns of New Zealand citizens within Australia.⁷

In the study of return migration to New Zealand (Lidgard and Gilson 2002), half of the participants in the study had made a return visit for an average of less than one month, while 20 percent had visited up to three times. Just over one-quarter of returnees planned to leave New Zealand again for 12 months or more, with the authors concluding that this mobile group of returnees is best labelled 'circulators' (p 112). Family and friends are the most common reasons given for choosing to return to New Zealand, whether from Australia, UK, or elsewhere (Lidgard 2001; Lidgard and Gilson 2002). Of those answering the question, 73 percent felt it was important or extremely important that their children grow up in New Zealand, a view that was particularly prominent in the responses of those returning from the UK as compared to Australia (also, Lidgard 1993; Lidgard and Bedford 1994).

7 Settlement and Circulation of New Zealanders Living in Australia: Patterns, Dynamics and Analysis (2005-2007).

There are also anecdotal suggestions that expatriates, once married and with children and grandchildren, are less likely to consider returning and that the longer the time away the less likely they are to return (Walrond 2005).

A discussion of return is inextricably bound up with debates around the Brain Drain and exodus of New Zealanders overseas. There is a concern that as a result of rising student debt and the search for better employment opportunities, the young are leaving New Zealand and staying away longer – and that some will be lost for good (Collins 2001). One survey suggests that the average debt at graduation for medics was \$65,206 and that 92 percent of graduating doctors had some form of debt. Two-thirds of the sample said they would consider leaving New Zealand within three years of graduating (NZMA et al 2005). Another study, 'Beyond the Brain Drain', noted that many of those leaving New Zealand were concerned about the lack of incentive to return (Wilson 2001), (also, Ward 2003).

Extended OE or forging overseas career pathways may have implications for transnational family formation, given that these years are prime partnering and child-rearing periods. When such New Zealanders who spend extended time overseas do return, they may bring back a partner they have met in the host or other overseas country. Regardless of whether they then decide to return permanently to New Zealand or move back overseas the implications are to create a transnational family – typically with one partner separated from parents and siblings.

5.3 SPONSORSHIP⁸ AND REUNIFICATION RESEARCH

While there is little evidence on the cross-national partnering relationships of New Zealanders, data on spouse sponsorship offers some limited insight. New Zealand research examining sponsorship of spouse/partner, parents, and humanitarian sponsorship found that 58 percent of parent and humanitarian applications were from female applicants, while 71 percent of spouse/partner applicants had male sponsors. Half of the spouse/partner applicants were New Zealand born, while the figure was only 1 percent for parent/humanitarian sponsorship. The place of birth of the sponsors of spouse/partner applicants varied with the nationality of applicants (NZIS 1999a).

In terms of parent sponsorship, research commissioned by the Immigration Service (NZIS 1999b) interviewed adult sponsors of their parents. These sponsors had the responsibility to provide accommodation and financial support for their parents for 12 months (pre-July 1998), or 24 months if the application was after July 1998. The research found that the main reason migrants were willing to sponsor parents was to enable family reunification and most mentioned a moral responsibility to "look after" ageing parents (p 3). The decision to sponsor was taken for reasons of reunification, mutual love and support, and to ensure that their parents were part of grandchildren's lives. Support provided by sponsors to parents included accommodation, living expenses, emotional support, social support, and transport. The research identified a reciprocal arrangement with parents frequently contributing through undertaking household chores, tackling household maintenance, and offering childcare. Only a minority of children sponsored their parents for functional reasons, such as enabling a grandparent to become the full-time childcare provider for a female sponsor where the father had returned to the home country because of difficulty in securing employment (p 10). In a small number of cases, the sponsor's fathers did not migrate to New Zealand because the aim was for the grandmothers to 'commute' between the two countries (p 30). Chinese and Indian parents were more likely to commute between New Zealand and their country of origin.

Over half the sponsors in this study were aware that they could sponsor when they chose to immigrate. Of those that were aware – about half said it was an important part of their emigration decision (pp. 23-25). However, some sponsors were unprepared for the strain it would place on family life and also had a lack of awareness of the sources of help and support that existed for parents when they did arrive. Not having sufficient money to buy a home and the loss of a family home were seen as problematic by some sponsored parents.

A review of the previous Humanitarian Category (NZIS 2000b) suggested 80 percent of the Principal Applicants were the child, sibling or parent of their sponsors. The study found that:

'Interdependence' was the most frequently cited cause of emotional harm with an incidence of 61 percent. Geographical distance was a cause of harm for 26 percent of respondents... (p 7).

8 Between 1949 and 1954, 549 children arrived in New Zealand sponsored by the New Zealand Government and Royal Overseas League in London and most were fostered or adopted (McDonald and de Soux 2000). This was only a fraction of the 130,000 underprivileged children going from Britain to the Commonwealth (1900-1967) (cf. Bean and Melville 1989).

5.4 TRANS-PACIFIC FAMILY CONNECTIONS

A number of discussions focus on the movement and transnational exchange of Pacific communities within the Pacific Rim (Macpherson 1999; Bedford 2000; Spoonley and Macpherson 2004). Some suggest that Pacific Island populations may engage in 'circular migration' rather than a form of chain migration, moving for example from New Zealand or Australia to Hawai'i, then onto Los Angeles or San Francisco, then Seattle, before returning to Samoa in old age (McGrath 2002: 327; also Bedford 2000: 117). It would appear plausible that all Niuean, Cook Island, Tongan and Samoan-based families would have close relatives living in New Zealand (Bedford 2000: 118).

Discussion of exchange has focused on remittances of cash, savings and goods (Vete 1995; Bedford 2000; Lee 2004). Research suggests that community commitment is a major family expenditure, including remittances such as paying costs to send or bring family members from the islands including parents and extended family (Pasikale and George 1995). Sibling education and extended family is another cost. All interviewees said sending money was expected, and expressed that it was for reasons of loyalty, to alleviate economic hardship, and to maintain ties. Remittances were higher for households where parents were still living in the islands.

Grieco (2004) cites 1995 data whereby remittances made up 60 percent of Tongan and 35 percent of Samoan GDP. Around 90 percent of Tongan households received remittances, constituting around 28 percent of household income. These may be conservative estimates, given the difficulty of capturing informal transfers of both cash and in kind payments. Concerns about remittance decline have not been supported to date by the evidence (cf. Brown and Foster 1995; Brown 1996; Bedford 2000; Grieco 2004). Vete (1995) suggests that remittance levels drop after four to seven years of migration, and then rise after 10 years and that gender, age, length of stay and dependents are important determinants. She suggests that when the family unites remittances will fall, but if chain migration or circulation migration is under way then it is likely they will continue (Vete 1995).⁹

With 58 percent of Pacific People born and raised in New Zealand (Statistics New Zealand 2002) there are important questions about the future continuation and level of remittances. Recent discussion emphasises the influence of *generation* rather than simply time, suggesting that younger '1.5 Tongans' and those Tongans born overseas have less commitment to sending remittances. In addition, many identify as having no direct family in Tonga (Lee 2004). That one-third to a half of Tongans overseas marry non-Tongans may also contribute to an erosion of remittances, particularly amongst the children of such unions (Lee 2004).

Even if return to the islands is not an option for those based in the Pacific Rim, there is still the acknowledgement of the roots of identity in the islands, and this may foster transnational relationships of being in two places simultaneously – so called 'meta societies' (Macpherson 1999; Bedford 2000). Children may be based in New Zealand and the islands for periods of time, while the context of adoption is another manifestation of how close familial ties may be nurtured. While broader visions of return may be limited to return visits, economic restructuring within New Zealand during the 1990s did lead to a rise in returns to many islands during this period.

5.5 SUMMARY

- > Detailed studies of migration offer some of the most useful data around transnational families.
- > Studies are increasingly seeking to grapple with mobility and continuous movement amongst migrants and subsequent generations.
- > There is considerable interest in the so called 'Brain Drain' or 'Brain Exchange' of young and highly skilled workers.
- > Refugee research identifies the centrality of family reunification.
- > Little is known about the return experience of many groups, such as the British.

9 Vete's (1995) study also found that nine of 81 households had previously had phones disconnected due to a large unpaid bill from international calls – evidence that maintaining transnational families may sometimes generate significant extra costs.

6.0 TRANSNATIONAL FAMILIES AND PUBLIC POLICY

The certainties upon which public and social policy have traditionally rested are increasingly eroded by globalisation and transnationalism. For example, non-standard employment patterns, the role of the internet, and greater population mobility, all present dilemmas for welfare delivery. Social policy continues to struggle with transnationalism's focus on mobility and span of two or more nation-states (and therefore welfare states, tax and fiscal systems).

Yet whilst accepting the increase in inward and outward flows, greater mobility, and life course uncertainty, policy must grapple with how family lives may transcend national borders; how such lives are lived, how transnational families adopt different strategies around reunification, continued separation, or further dispersal through various points of the life course.

New Zealand has a diverse set of transnational family structures arising from complex population exchanges. While precise numbers are unknown, the evidence of Sections Two, Three, Four and Five points towards the magnitude and diversity of transnational families. Section Six highlights the potential public policy issues that emerge around transnational families, some of which will be addressed at the national level, many of which will require cross-national agreement, with, perhaps, others that may require the attention of institutions of global governance.

Some public policy concerns around transnational families are very broad – the maintenance of competitive environments for communications and international travel being one instance of how best to ensure strong transnational family ties. Such families are major beneficiaries of competitive airline and telecommunications pricing.¹⁰ The rate of currency exchange and purchasing parity can also influence potential travel decisions, including extended visits to support families and even permanent settlement in terms of housing options that may be available.

It is possible to identify a set of more discrete policy issues around transnational families. As the New Zealand Immigration Service (2004b) notes, the government has four main tools it may use around immigration. These all have a bearing on transnational family formation and functioning, and are drawn on here to structure the section's discussion:

- > The absolute level of residence approval.
- > The mix of migrant types.
- > Post arrival requirements (eg restrictions of benefit eligibility).
- > Post arrival settlement services.

6.1 RESIDENCE APPROVAL LEVELS AND THE MIX OF MIGRANTS

The discourse of mobility can underplay the reality of nationally determined immigration policy, ignoring borders, visas, overstaying, detention, and even the ultimate sanction of deportation. Despite talk of transnationalism, states still determine whether, and the circumstances under which, individuals can emigrate. The role of the state clearly determines transnational communities' futures (Faist 2000), and this in turn helps shape transnational families.

This is a key issue for family reunification and stated succinctly, 'migrants cannot determine for themselves the persons who constitute their family' (Kofman 2004: 245). Family reunification is regulated by each state, which denies some the status to sponsor relatives to join them (students, asylum seekers, interim-workers, and illegal workers) and may also change definitions of who is to count as 'family' (cf. Perruchoud 1989). From October 2001, for instance, there were attempts to recognise diverse family structures within Family Sponsored (and International/Humanitarian) Streams. In 2001 the definition of dependent children was expanded and new policy provisions for adult siblings and adult children were introduced. Sponsorship policy also changed, whereby less dependent relatives could not be sponsored for three years post residence approval. As a result there was a large decline in the flow of Family – Parent applications.

¹⁰ To the end of year December 2003 just over one-quarter or 572,500 of total visitors came to visit friends and relatives (Statistics New Zealand 2004a, Table 2.02). Visits to see friends and relatives jumped from 350,000 in 1997 to 572,500 in 2003. It was the biggest category percentage increase beyond holiday and business. Forecasts suggest it will continue to grow.

As well as tighter entry criteria, policy targets and ratios may create backlogs for family reunification. Thus for the 2004/2005 financial year the government has allocated 45,000 places for people to be granted New Zealand residence under the Immigration Programme. The mix of migrant types is also specified: Skilled/Business Stream (60 percent); Family Sponsored Stream (30 percent); International Humanitarian Stream (10 percent). As Ho and Bedford (2005) suggest, such targets and ratios help shape transnational families by closing some routes and offering new stepping-stones to residency. This may have the impact that some transnational family lives will be less the result of free choice and more a response to the backlog of family reunification cases and tighter criteria. Also important to recognise is that while migrants may move with family, refugees and asylum-seekers cannot. Yet their separation is intensified by the fear of harm to family members who may remain in the country of origin.

Lu is Chinese, and after completing her Computer Science degree at Auckland in 1999, decided to migrate permanently to New Zealand and received residency in 2001. Since being in New Zealand she has married Gus and they have had their first child. Lu is hoping that her mother will join her permanently once the reunification backlog allows this. In the meantime, her mother has visited for an extended period, which has been wonderfully supportive but brought its own challenges, such as all four of them sharing Lu and Gus' two-bedroom accommodation.

Some recommend that procedures for reunification should be clearer and better known – particularly amongst the refugee community. However, there is also a more fundamental policy question of whether family reunion is a right or simply desirable, and the answer to this question will help shape some transnational family forms.¹¹

6.2 POST ARRIVAL REQUIREMENTS AND PORTABILITY OF PENSIONS

Michael is a New Zealander who has married an American and chosen to live in Argentina. They have recently had a child. Michael's father, Eric, would consider moving to Argentina to be close to his only grandchild, yet if he does, Superannuation is paid at only 50 percent of its normal rate. He cannot afford such a drop in income. He relies instead on phone calls and yearly visits to maintain contact with his son.

Melanie is Niuean and has lived in New Zealand for the past 30 years. She is a widow and recently retired. She chooses to spend the New Zealand winters back in Niue and extended summers in Auckland with her two children and four grandchildren. She receives her full Superannuation entitlement in Niue. Her daughters look forward to when she returns 'back' to New Zealand because she is always so willing to provide childcare if called upon. Some of the grandchildren have been to Niue to stay with her for extended periods.

Most national pension schemes were not designed with mobility in mind and portability is a major policy issue for transnational retirees and, with increased population exchange, likely to become even more pressing. Considering this issue first from the perspective of a New Zealand migrant parent, as the above scenarios illustrate, where a parent chooses to retire can have a major bearing on their New Zealand Superannuation (Super) entitlement. Super may be paid to those living outside New Zealand via:

11 It is worth mentioning that reunion was prioritised for former British child migrants to establish contact with close family in Britain following the UK Health Select Committee Inquiry of 1998. In all, 96 migrants were sent to reunite with family: parents, aunts, uncles, brothers and sisters whom they had not previously visited. Even here there were immigration anomalies because many lacked British or New Zealand passports, they could be classed as overstayers within the UK but (until 1995) had to apply and pay for New Zealand citizenship!

- > Special Portability Arrangements which allow a person who is receiving New Zealand Superannuation to be paid the full entitlement if they retire to one of 22 specified Pacific Island countries. In 2002, 349 pensions were paid through this arrangement in New Zealand dollars, with the precise rate being determined by exchange rate fluctuations.
- > Reciprocal social security agreements with seven countries¹², which allow New Zealand Superannuation to be paid to applicants living and applying from those countries. Under the new social security agreement with Australia for example, the Australian Government will pay pensions for migrants who reside in Australia and then retire in New Zealand, according to the time they have lived in Australia, and vice versa (Bushnell and Choy 2001).
- > General Portability, which allows a person to receive 50 percent of their Superannuation entitlement if they choose to live outside New Zealand in a country not covered by a Social Security Agreement or the Special Portability Arrangement.

Secondly, there are similar issues of portability for returning New Zealanders or migrants to New Zealand who have worked overseas and then choose to retire to New Zealand. Those who have paid into overseas contributory government pension schemes must declare whether they are eligible for an overseas pension (or indeed pensions if eligibility has been gained in more than one country). New Zealand Government agencies (under Section 70 of the Social Security Act) have the power to offset overseas pensions in full (ie a 100 percent deduction) against New Zealand entitlements. Similarly, a New Zealander who marries someone from overseas who has contributed to such a scheme would be treated in the same way if their spouse's married pension was more than the rate of New Zealand Superannuation.¹³

Problems can arise when contributions are made to countries with which New Zealand has no social security agreement, or countries which fail to index pensions (cf. van Bussel 2003). Thus, for example, it is a requirement that all citizens who live and work in the United States put money into the compulsory social security scheme. However, if they subsequently return to New Zealand (or live outside the United States) they are denied all their entitlement. For transnational parents and grandparents moving from the UK there are also difficulties. The British Government has a policy of freezing the pension rate when a person moves to some countries, including South Africa, Australia and New Zealand.¹⁴ A British pensioner joining their children in New Zealand would have their pensions topped-up by the New Zealand Government to the level of New Zealand Super.¹⁵ However, if the same pensioner went to live in one of 40 other countries, including USA, France or Greece, their British pension would then be up-rated.

People may want to retire overseas but if there is no agreement with the country concerned then they are not helped to do so (cf. MSD 2002). There are over 50,000 overseas pensions paid to retirees in New Zealand, and 9,000 New Zealand pensions paid overseas (Statistics New Zealand 2004b). However the issue is likely to increase in salience given the ageing population, changing social attitudes towards retirement, and the prospect of greater retirement return to countries of origin (cf. Graham 2000: 194).

Portability issues such as these may shape the decisions of older immigrants who are considering whether to retire in their country of origin, whether to follow their child overseas, or whether to stay in New Zealand. Similar questions will face New Zealand citizens. Clearly the organisation of national social security schemes does not fit well with a world of increasing mobility; this is particularly so when flows are relatively uneven from one country to another and which may prompt a tightening of eligibility. Since changes to Australian policy in 2001, New Zealanders can still live and work in Australia with a Special Category visa but those entering after 2000 are restricted access to social security unless they opt to apply for permanent residency. Not all New Zealand citizens will be successful with such applications and restricted access to social security could help shape the decision around whether children join their parents who may be living in Australia.¹⁶

12 There are reciprocal agreements with Australia, Canada, Denmark, Republic of Ireland, Greece, Jersey and Guernsey, and the Netherlands. New Zealand also has an agreement with the UK.

13 Yet those who have saved independently are able to receive full payments.

14 An unsuccessful case was brought against the British Government in 2003. The Law Lords ruled however that 'The primary function of social security benefits including state retirement pensions is to provide a basic standard of living for *the inhabitants of the United Kingdom*' (italics added).

15 By 2005 there were nearly 40,000 UK pensions paid in New Zealand..

16 New Zealand is still liable for pension and disability payments received by New Zealand citizens in Australia.

Emma's parents have recently retired to the Gold Coast. They have no family members in Australia but enjoy the sunshine and the golf. They return a couple of times each year to New Zealand to visit family and friends. Emma has three school-aged children and the cost of them all visiting their grandparents is prohibitive. She misses their support. She would think of joining them in Australia but is not sure of her husband's job opportunities or her own earning power and she would not want to be reliant on her parents for financial support.

As Bushnell and Choy (2001: 16) note, large imbalances between countries risk social security schemes making payments to people who have not made past tax contributions, and if policies differ this may encourage forms of what are known as 'benefit tourism'. Identical benefits systems would remove such an incentive, otherwise the proliferation of bilateral social security agreements or the creation of individualised contributory pension accounts, may be required.

6.3 AN AGE OF RETIREMENT?

Beyond pension eligibility, retirement raises further issues for the New Zealand diaspora, given there is always the possibility that those that have left can return, and this includes New Zealand born and non-New Zealand born. Whether this will happen depends on a number of demographic, economic, and social considerations (such as the preference when retirement is reached for returning to country of origin versus settling in a country of outstanding natural beauty). If such a trend to return did occur it could have significant fiscal impacts, given what is effectively a non-alignment of tax-collecting and benefit/service-dispensing jurisdictions (cf. Ley and Kobayashi 2005: 124). This includes access to health care, social and public services that are subsidised or provided free at the point of delivery from the public purse, and dispensed to a population with a lower tax yield (cf. Glass and Choy 2001: 13). As life expectancy increases so will debates around the contribution of the non-working age population. While traditionally discussion has focused on 'family' centred retirement, it may be that a shift to 'lifestyle retirement' (cf. King et al 2000) will have further implications for transnational families. This may include retirement decisions to move to places where there are no existing family connections. In such instances, the grandchildren of these older people are deprived of potential carers, and older people are left without suitable networks of support as they move into later years.

Continuing to explore the quantitative and qualitative evidence around retirement trends, attitudes and preferences, is important and must also recognise the divisions within the retiree population. Differences in life chances impact upon retirement options and have flow-on effects for transnational families.

6.4 POST ARRIVAL SOCIAL SERVICES

New Zealand has a changing ethnic and cultural mix, and this will continue as the population ages. In 2001, around 30 percent of those aged 65+ were born overseas, and of those born overseas nearly 60 percent were born in the UK or Ireland, with 10 percent from North-West Europe, and 8 percent from the Pacific Islands. Over time, these cohorts will be replaced by more ethnically diverse ones (Statistics New Zealand 2004b).¹⁷ The Positive Ageing Strategy notes the importance of providing a range of culturally appropriate services for older people that will include newer migrant groups who may have migrated to work and then retired in New Zealand (MSD 2001: 21).

Migrants who have moved to New Zealand as business migrants or skilled workers may experience isolation in later life, particularly if their children choose to travel and live overseas (or locate elsewhere in New Zealand). Ageing parents may find themselves lacking close family support, and perhaps ruing the loss of close networks that existed in the country of origin.

Some transnational families that have been stretched across borders for some years may contract through processes of reunification, and the diversity of transnational family groups and associated

¹⁷ Overall, the proportion of the population aged 65+ will rise from 12 percent to 18 percent by 2021. The proportion of the Pacific and Asian populations aged 65+ will double (to 6 percent and 9 percent respectively).

policy must take account of this. Canham-Harvey (2003) notes that older people who have arrived under the family reunification scheme or arrived to care for grandchildren will have different issues from those whose route was as a skilled or business migrant.

If transnational family relationships do involve eventual reunification of ageing parents with children within the migrant country, caring obligations and expectations may be placed on adult children. Moving when old may have unforeseen outcomes, with the person becoming isolated and with few close networks of their own. Adult children may work long hours and there is often the added pressure of dual worker households. Such issues are common across all cultures. As a result, sponsor families may be unable (and sometimes unwilling) to meet the obligations placed on them by parents and in-laws. Parents' care expectations may not match those of children, and where family cannot meet care requirements there may be an unwillingness of parents to use public services. Particular issues arise for minority ethnic groups who need social supports and for whom culturally sensitive services are not available.

Alan is South African and has lived on Auckland's North Shore since 1999. His mother has emigrated to join him, his wife and their two children. She seems to have settled in well and dotes on the grandchildren. The area where they live is home to many fellow South Africans. Alan knows that his mother frequently gets homesick but is not sure what to do about it. His mother lived with them for the first year before moving into her own accommodation, which was smaller than she had hoped, given the strength of the rand and expensive property market. Alan's wife would like to move to the South Island for business opportunities but Alan is not sure it would suit his mother. He is aware his mother is becoming increasingly frail and does not want to leave her alone. His sibling from Australia is due to visit at Christmas, but Alan doesn't want to ruin the festivities by raising the issues.

Of course, not all transnational families will choose reunion or return as a way of discharging obligations to their elderly parents, and may instead choose to live lives across borders. Institutional constraints imposed by governments, employers and other agencies may hamper the ability of transnational migrants to care for their distant parents in these situations (Baldassar et al 1999). If reunification is not the preferred option (or not possible) then extended visits may be another way that transnational family is sustained. Here wealth will make a difference to the opportunity for regular visits, and perhaps in meeting the costs of parents' visits including flights, medical services and living costs. Adult children's visits to parents will bring high costs as well as the obvious share of rewards. Baldock (2000) suggests that:

Recognition on the part of governments, employers and other agencies that migrants maintain close and important links with their distant families would help to overcome some of the constraints (unpaginated).

This may include flexibility around taking annual leave and long service leave, which would allow for time to be taken in blocks.

The Ministry of Economic Development (2003) points to the potential for family isolation as a result of the outward flows of younger New Zealanders:

The existence of outflows of young people who leave permanently also raises risks of creating a pool of elderly people with no family support.

If children are absent it may be that parents are more open to financial abuse, because, for example, they may have to purchase services from trades-people and make financial decisions that relatives would have provided or arranged. It is also not uncommon for neighbours to become extended family, offering friendship and functional support.

One should not assume that issues of isolation and dependency are important for older people alone; instead the issue is more one of the interconnectedness of all human relationships. Undoubtedly, older people (whether New Zealanders, or parents of new migrants) may face such issues, whether in the

home or host country. However, lack of family support can also mean that there are no childcare networks for new migrants with young children, who without close kin must devise their own childcare solutions, solutions that are inevitably shaped by the economic resources at their disposal (cf. Wall and ão José 2004). International students within New Zealand are also typically without close family supports and this raises some concerns about their wellbeing in terms of health status and risk behaviours.

Irma is Iraqi and moved to New Zealand in 2001 with her two young children under the UNHCR quota. She enjoys the New Zealand lifestyle, and although money is tight tries to send some to her extended family still based in Iraq. She hopes that at some point they will be able to join her. She relies on an informal child-carer in the Iraqi community three mornings a week, and likes how the child-carer tells the children stories of her homeland. These are stories Irma remembers hearing from her own grandmother.

Transnational family relationships, isolation and dispersed families may encourage the emergence of transnational social service agencies and approaches. These are agencies based in one country but servicing 'clients' and interests that may span more than one nation. ICANZ, for example, offers transnational linkages around issues of inter-country adoption and New Zealand. Also, social services agencies caring for older people may find themselves dealing with relatives outside New Zealand who still wish to be involved and informed, and to intervene in an older person's life. Technology will facilitate such transnational caseloads. In relation to Maori economic and social development, there is a push for many iwi to make and maintain contact with dispersed family members based overseas, and this will continue in future. There have been some suggestions that in overseas cities where there are high numbers and concentrations of Maori (such as Sydney), Maori development and services should be fostered by the New Zealand Government in recognition of Treaty obligations.

Social support and transnational families also raise questions about the support of family overseas through remittances. Given the significance of remittances for some transnational families and communities, it is important to be aware of the size and shape of such flows, and ensure the best opportunity is made of such remittances. This may be through seeking to reduce transaction costs and improving technology in the transfer of remittances (cf. Goldring 2004), or facilitating the provision of an investment environment in receiving countries (Bedford 2000, 2004). Understanding of the current and likely future shape of remittances is vital, given their relationship to development in recipient countries and the potential pressures on New Zealand immigration policy should they decline rapidly (cf. Walton-Roberts 2001). Little is known about inward flows of remittances *from* overseas populations of New Zealanders back into New Zealand, or from more recent migrants and refugees to relatives in countries and regions of origin.

James is Tongan and married to a New Zealand European. They live in Wellington and are saving for a deposit for their first house. His wife does not understand the traditions around gifting, and tells him it is taking them longer to move into their own place. If interest rates increase any more then home buying will be beyond them anyway. They may move to Sydney or Los Angeles for a while where his cousins are currently based.

Forming transnational families and seeking to bridge two cultures inevitably involves emotional journeys. As well as being relevant to a number of the migrant groups above, there is some evidence in relation to inter-country adoption that childcare services may be needed at some points (Yngvesson 2004: 236). Transnational adoption emphasises the importance of connecting to place and family in the country of origin. This can involve a search for extended family, including birth parents, grandparents, cousins and extended family, with visits to the birth family and birth culture seen as rites of passage (Kim 2003; Yngvesson 2004). While the circumstance of transnational adoptees will vary (as with *all* transnational experiences), it is important that individuals are assisted with these processes and journeys.¹⁸ Such a search may also uncover siblings and half-siblings, potentially raising questions of obligation – not only from the adopted child but also from the adoptive parents.

18 Indeed Kim (2003: 77) notes that Korean adoptees, with their adoptive families and their biological families, are building 'superextended' families and also a sense of kinship among themselves.

Joanna was born in Ireland to an Irish birth mother. Joanna's adoptive parents are a New Zealand mother and English father. She lived in Ireland and then England until she was 10, when as a result of her parent's separation she moved to New Zealand with her mother. Her father now lives in the US. Joanna is planning to spend some of her forthcoming OE working in Dublin to help pay off her student loan. She is proud of her Irish passport and would like to know more about her Irish roots and connections, perhaps even trace distant relatives, but is unsure how (or whether) she should do this.

6.5 SUMMARY

- > The size and mix of immigration flows shapes transnational families.
- > Pensions influence where retirees choose to live.
- > Transnational family living may result in reunification which may bring its own difficulties.
- > Transnational family living can result in isolation and lack of social support for a range of groups including international students, parents of young children, those migrants parenting alone with partners overseas, and older people.
- > Remittances can be integral to sustaining relationships and wellbeing in host and home countries.

7.0 TRANSNATIONAL FAMILY FUTURES

The aims of this scoping study were:

- > A typology of different groups and sources of transnational communities, drawing on historical and contemporary flows.
- > Wherever possible, a demographic analysis of these transnational populations and family forms.
- > A conceptualisation of the differing network relationships.
- > To contribute towards the theorisation of transnational families within the New Zealand setting.
- > The beginnings of a 'futures audit' of emerging public policy issues vis-à-vis New Zealand's transnational families.

Earlier sections focused on the various migration routes and roots of New Zealand and the overseas diaspora of New Zealand citizens. The literature around transnationalism was used as a basis to explore the dynamics of transnational families. The exercise has identified a range of research studies around transnational migration, and an increasing recognition of the importance of micro and meso levels (cf. Yeoh et al 2002, 2003). The evidence on New Zealand's transnational families was used to inform a discussion of policy issues.

While some policy gaps are being explored (for example the Ministry of Social Development's current review of pension portability), the implications of transnational families for various spheres of legislation, current and future government institutions, the provision of information, and organisations, are not well understood. This paper has sought to go some way towards highlighting key policy issues, particularly around immigration policy, pensions and social security eligibility, and social supports.

In conclusion, there are two points to which it is important to draw the reader's attention.

7.1 THE NEED FOR INFORMATION

First, there is a paucity of statistical data on the range of transnational families and their lives. As the consultation around the 2006 Census acknowledged, the ways families were classified and measured may be inadequate to capture the diversity of family circumstance in New Zealand (Statistics New Zealand 2003). To this it may be added that transnational families further complicate the picture. There is an urgent need to understand more about our transnational family forms and links.

To this end the project team has sent a submission to Statistics New Zealand's General Social Survey Preliminary Consultation (30 September 2005). The submission stresses the importance and value of asking questions about transnational family within the Social Survey (social connectedness domain) that is planned for 2007. A specialist family survey may be the best way of collecting complex family information. Statistics New Zealand is also undertaking a review of family statistics issues, with a Family Survey planned for 2008/2009. These are key opportunities to generate a robust information base upon which to track and explore transnational family issues.

Research studies currently under way (*Circulation of New Zealanders in Australia*), follow-up surveys and interviews of previous migrants, and the longitudinal immigration survey of NZIS, will all help inform our understanding of transnational family forms. Earlier studies (such as Bartley 2004) should be encouraged to follow-up their earlier samples in order to contribute to knowledge of change over time (cf. Ho 2002).

Notwithstanding such activity, major gaps exist in our understanding of transnational families. This includes past, current and potential return migration for groups such as Pacific Peoples, British migrants, and 'New Zealanders' themselves. Fletcher (1999) notes that there is scope for gaining useful settlement information for those that re-migrate from New Zealand through a specific survey. It is highly likely that returnee stories would emphasise the importance of family as the reason for return (cf. Hammerton 2004: 274 for British returning from Australia; also Lidgard (2001) for evidence on

returning New Zealanders). What may emerge is that migration is often intended to be temporary, but that people become trapped in transnational lives (Baldock 2000: 209).

The occurrence of second-generation return and the strategies involved therein are important research questions. Hutchings (1999) noted that many in her sample of assisted migrants had children now living in Britain. Again, there are some anecdotal suggestions that parents are following their children overseas. Knowledge of these dimensions would help fill out our understandings of 'new New Zealanders' and 'New Zealanders abroad', including why some parents join their migrant children overseas while others do not (Baldock 2000: 216), and what encourages some to engage in constant 'shuttling'.

Whatever research is undertaken it must pay attention to texture and be concerned with change through time. As the 'kaleidoscope' of Section Four suggests, capturing the dynamism enlarges our knowledge and understanding. Particular sorts of research will complement statistics which do not themselves always allow for the tracing 'across space and time' of family history and family dynamics (Kofman 2004). As Parr et al (2000) note:

Whilst estimates of the sizes of particular *ethnic groups* in a range of destinations are available, and there is a vast literature explaining the formation of diasporas, a lack of data on the extent to which *families* have dispersed within diasporas is evident (p 214, italics in original).

Research must consider such mobility and seek to round out the life course, understanding individuals within their family contexts; contexts which themselves take place within structural parameters, albeit with mutual interplay.

7.2 THE FUTURE SHAPE OF TRANSNATIONAL FAMILIES

The second point concerns the future of transnational families. The future shape of families will be determined by factors including technology, changing social attitudes and expectations, and the opportunities afforded by national policy frameworks. Increased mobility may generate new transnational family categories, with networks maintained in novel and multiple ways. Different forms of movement forge different sorts of network connections, and while for some their overseas connections are 'given', for some they lie more 'latent', and for the remainder there is always the possibility of network 'acquisition'.

The percentage of New Zealanders with a 'given' overseas chain of connection is high when the overseas-born and recent migration patterns are taken into account. 'Latent' connections may involve second or third generation migrants wishing to (re)discover connections with countries of origin, perhaps through seeking a marriage partner, extended career spell spent in the country, or even a choice of retiring to what is seen as a spiritual home. There will likely be continued 'acquired' overseas connections, as international travel and communications ensure that passports and personal lives collide, be this through inter-country adoption or marriage and marriage migration.

New Zealand is synonymous with population exchange and there would seem little likelihood of this changing in the near future. One would guess that the percentage of the New Zealand population with no current overseas transnational family connection is likely to be fairly low and to remain low.

When it is said that countries share 'a history' or are 'close', what in effect this means is they share numerous interconnected *family histories* that span borders. While we cannot predict the precise nature of those exchanges in the future, we do know that transnational families will continue to show innovation and resilience. The shape and direction of change remain fundamentally propositional and empirical questions. The answers to such questions will inform more effective public policy and nurture transnational (family) futures.

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