# MIGRATION

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**Keywords:** population movements; spatial mobility; international migration; human settlement; ethnic diversity; causes and consequences of migration; migrants' integration; migration pressures

## Contents



## Summary

Migration belongs to major population phenomena studied by a number of disciplines, such as demography, economics, geography, political science and sociology. Migration is a form of spatial (geographical) mobility between one geographical/administrative unit and another. It usually involves a more or less temporary change of residence from the place of origin (departure) to the place of destination (arrival). Very often, however, the duration of stay at the new residence is such short that the term "circulation" (alternatively: "visit", "trip" or "movement") seems more appropriate. Nevertheless the duration of migration (stay in a new place of residence) can accurately be determined only a posteriori. Since from the point of view of scientific analysis and policy making, this is rather impractical, alternative criteria are being sought. In accordance with the most popular, the duration of migration is amply approximated by applying categories a priori, usually established on the basis of migrants' intentions/declarations. Consequently, the measurement of migration often refers to the moment of its initiation (or registration).

## 1. Introduction

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Discipline-wise approach to spatial mobility allows for distinguishing four basic analytical perspectives. First of all, it is perceived as a component (besides fertility and mortality) of population change, both in terms of the size and distribution of population. Secondly, spatial mobility is seen as socio-economic adaptation of individuals, households or more largely conceived communities, or in other words an adaptive process in response to evolving imbalances in the environment. Thirdly, it is viewed as a routine life-course event, not so much provoked by various and complex environmental imbalances but rather stemming from normal everyday experience of individuals passing through various phases of their life cycle. Final perspective sees spatial mobility as a rational behavior aiming at maximizing socio-economic well-being of the decision-making unit, be it household or family.

In turn, viewed from the perspective of the place of origin, migration is termed out-migration or outflow (or, in a more restrictive sense, pertinent to the settlement, emigration) whereas viewed from the perspective of the place of destination, it is termed in-migration or inflow (or, in a more restrictive sense, immigration). Another important distinction is made according to the permeability of administrative boundaries which the moving people need to cross. A particular case in this regard is international migration because as a rule moving from one country to another is subject to specific strict and politically-determined regulations which make (or attempt to make) the movements of people limited, controlled or manageable.

Defining of migration facts is much more arbitrary than the defining in case of other major population phenomena, such as fertility or mortality. This is because migration – as opposed to other population phenomena - is more a process, sometimes multi-stage one, than an event. In practice migration is defined and distinguished from other forms of spatial mobility by means of juridical/administrative criteria. Last but not least, the study of migration (including other forms of spatial mobility) is applicable only in the case of relatively settled populations.

The reminder of this paper starts from a brief discussion of the concept of migration as a part of human life. Then an evolution of modeling of and theorizing on spatial mobility is presented. This is followed by a description of basic past trends and relatively more comprehensive presentation of the present migration phenomena in the world. Next,

major policy challenges that result from the current trends are examined. The paper closes with a succinct reflection on the future of migration.

## 2. Is spatial mobility inherent to human life?

Unlike birth or death, migration does not necessarily occur in one's life. No doubt, humankind is territorially highly mobile; people almost constantly move, e.g. from home to work place. On the other hand, it appears - at least in present times, although with some exceptions (e.g. nomads) - rather immobile in the sense that people seem generally reluctant to stay away from home for a relatively long time. It has been rather common in modern history worldwide that a large part if not majority of the residents of individual administrative units (municipality, county, district, region, State, etc.) live their whole life without moving beyond the boundaries of those units.

Therefore in the real world, irrespective of the intensity of spatial mobility (migration, in particular) in the case of individual population, the mobility is relatively low in the sense that only a tiny minority of people move within a conventional time unit (e.g. one year) or, sometimes, even over the life span. However, spatial mobility can be seen as not just a collective virtue but also as an individual predisposition. For in all populations, even those with extremely low migration rate, there are always highly mobile persons, ready to migrate under any circumstances. Those highly mobile, no matter what is their actual proportion in the population, are very influential as very often they are followed by many more, by their nature less mobile, persons. By this, migration is a chain phenomenon whereby each actual migrant paves the way for other migrants from a given locality/community.

## 3. The state of art

A systematic study of spatial mobility started with works of Ernest Ravenstein presented (in 1885 and 1889) to the Royal Statistical Society which claimed the existence of the laws of migration. What in particular has been evidenced in those works were: an inverse relationship between the flow size and the distance (but at the same time, a direct relationship between the intensity of migration and the development of transportation means, and, generally, industry), a tendency to migrate sequentially in stages from localities of relatively low attraction to nearby localities of relatively high attraction, and diversified propensity to move among people representing different socio-demographic characteristics. Besides, it has been suggested that the main motive for migration is a desire to improve one's economic conditions. The "laws" developed by Ravenstein were in fact the generalizations arrived at by means of statistical analysis. The analysis, however, was based on the population census data from relatively limited number of countries and time span. Despite this and initial sharp criticism those "laws" evoked, in the course of time they have increasingly been substantiated or supported by many research undertakings world-wide.

In the 1940s a popular "gravity model" of migration has been developed (by Zipf, Kant and others) which states that migration volume is directly proportional to the population size in the places of origin and destination and inversely proportional to the distance between the pairs of places. The concept of a physical distance *per se* as a migration

determining factor was challenged by Stouffer (1940) who suggested that in the case of a given distance (from origin to destination) the number of migrants is directly related to the number of (attracting) opportunities in the place of destination and inversely related to the number of intervening opportunities (attraction of places located between the place of origin and destination). This gave rise to an even broader framework, known as the push-pull factors hypothesis (proposed by Lee in 1966). According to this framework, a propensity to migrate depends on the interplay of the factors of attraction present in the place of destination and the factors of expulsion (obstacles) in the place of origin. Ultimately, however, migration, which requires a strong stimulus to materialize, is additionally influenced by the intervening obstacles (e.g. administrative barriers) and individual characteristics of people. No matter how successful in describing the real population movements, various gravity and push-pull models proved unsatisfactory in their failure to explain the nature of migration, in determining why do the people migrate, and why they do so in the observed quantities and compositions. In response to that deficiency, two major (mutually independent) schools of thought emerged: economic and sociological. According to the former, the economic factors are solely responsible for making people move, whereas according to the latter it is social (migration) networks.

The economic explanation dates back to the 1930s (Hicks) when a postulate that the main cause of migration (as a means of the balancing of labor markets) is spatial wage differential was put forth. This was in line with Adam Smith's observation that migration for work stems from differences in the supply of and demand for labor in various places. At present, according to Harris and Todaro (1970), it all depends on the endowment of particular markets of labor relative to capital. Markets (regions, countries) with a high labor endowment relative to capital tend to have relatively low wages which prompts workers from those markets move to markets with relatively high wages. In dynamic perspective, however, the intensity of actual flows of labor depends on the degree of mutual economic co-operation/links between different places (regions, countries), particularly on the degree of liberalization of the trade and the freedom of capital flows. What directly follows from the now popular Heckscher-Ohlin theorem, the more economically integrated these places, the higher level of labor productivity convergence, and, consequently, the wage rates convergence, and, ultimately, the less migration.

The concept of migration networks insists on a broader conception than just limited to the movements of labor. It emphasizes the role of family in generating migration flows and in migrants' insertion and integration in the place of destination (e.g. Hugo, 1981). First of all, migration of any household member might be due to a collective decision of that household. Secondly, frequently migrating family members follow in the footsteps of one of them who did it first. Third, kinship ties between migrants already established in the place (region, country) of destination and potential migrants in the place (region, country) of origin facilitate both the decision to migrate and the adaptation to conditions of the former (shelter, job, financial assistance, general guidance, etc.) in the initial period after arrival.

At a relatively more general level of analysis, migration is explained by modernization which combines the influences of such factors as demographic, economic, political,

social or psychological. Such at least is a postulate of the hypothesis of the mobility transition set forth by Zelinsky in 1971. According to that theoretical concept, which proved to be more pertinent to the more developed than the less developed societies, modernization implies specific changes in the patterns of spatial mobility. A major change has been a sudden rise in territorial mobility of people which had initially stemmed from two main factors: industrialization and the demographic transition. The former necessitates the transfer of a large part of (redundant) agricultural workers to industry where labor is in acute demand, and by the same token from rural to urban areas, whereas the latter produces sharply growing numbers of people to be reallocated. This universal and global process involves a number of interactive mobilities, including internal migration from villages to towns, international migration, town-to-town (or intra-urban) migration, circulation (various types of short-term mobility). The mobility transition hypothesis posits that in the course of modernization some types of mobility shrink due to the depletion of human resources (e.g. rural-urban), mobility of certain types is absorbed by other types of mobility (e.g. rural-urban or urban-urban migration by circulation), and ultimately a part of potential mobility is averted thanks to wider availability of services or technology improvements (e.g. electronic communication).

Recently a considerable contribution to migration theory has been made with respect to international migration *per se.* Three general and global perspectives can be mentioned here as an illustration. The systems approach sees migration within the framework of mutually interwoven migration systems. Each migration system comprises a group of countries that have a relatively stable position of being either net sending or net receiving entities, and share a number of other characteristics. For instance, in case of a system comprising the destination countries, their level of development, institutional structure and cultural affinity are similar, and the level of political and economic integration is high, they receive migrants from the same systems comprising the countries of origin, and their migration policies are mutually consistent and collaborative. Such concept allows for linking various systems of sending and receiving countries, using more appropriate analytical tools, selecting given system-specific and more adequate explanatory variables, and including various pertinent feed-back mechanisms. On the other hand, according to Zolberg's (1981) political science perspective, migration can be perceived as basic conflict of interests between individuals considering migration and societies/States of departure and arrival. For one of viable choices faced by the persons who aim at maximizing their individual welfare is to be transferred from one political jurisdiction to another. The States in turn are, among other things, entrusted with the task of controlling the exit and entry of individuals and their membership in society as a means of maximizing collective welfare (along with other societal goals). The actual international migration depends on the degree of antagonism between individual interests represented by potential migrants and collective interests represented by the States (both of origin and destination). Finally, historical-structural perspective, proposed by Wallerstein (1974), offers an explanation of that migration by using a concept of the world capitalist system. Each State belongs to one of three segments of the system: core, semi-periphery and periphery, which are politically and economically linked in a specific hierarchic manner. That interdependence influences the direction and nature of foreign trade as well as the flows of capital and labor. For instance, a large migration occurs from the periphery to the core. This is so for two particular reasons. First, because economy of

the latter is characterized by relatively high unsatisfied demand for low-paid workers whereas economy of the former by relatively high surplus of labor ready to accept low wages. Second, individual States that constitute the core might be relatively strongly tied with particular periphery countries by their common colonial history which facilitates the periphery-to-core flows.

In addition to these theories of rather broad focus, some others have been developed which refer to a fundamental question: why certain countries receive migrants while some others send migrants? As a representative of theories addressing the former, the dual labor market theory might be mentioned here. It argues (Piore, 1979), that given some level of unemployment everywhere in the world economy, the redundant labor from the South is attracted to the North (while the opposite does not occur) because of the duality of labor market of the latter. Jobs in the secondary/"inferior" segment of labor market in economies of the North often require very low skills, and they are not only associated with relatively low wages but also unattractive terms of employment, low prestige and low occupational/social status. This is why local workers, even if unemployed, are reluctant to take those jobs. On the other hand, seemingly the simplest means to overcome the labor scarcity, which is raising wages, is of limited applicability, if feasible at all, in this case. First of all, the prospects to change the low social status for workers attracted by a hypothetical pay raise will remain bleak anyway. Also, an increase in wages in that segment of the labor market would have been likely to affect the situation in the primary/"superior" segment. In order to maintain socially acceptable wage differentials, a pressure would have been exercised on wages in the latter, which would have ultimately increased the costs. Eventually, in the situation of acute labor deficit, employers find it rational to resort to recruitment of migrant workers originating from the South who are ready to disregard low prestige and accept low pay and precarious situation in the secondary sector.

In turn, the mechanism turning some countries in huge reservoirs of migrant workers is described by a theory known as the new economics of migration (Stark, 1991). Migration decisions, which are made collectively within household (family), tend to be relatively common in countries of the South (the less developed countries). This is so because in the South, the household in its strive to maximize economic welfare, encounters insecurity and constraints related to various institutional failures. On the one hand, it is highly exposed to risks resulting from the lack of institutional safeguards for individual households in the case of personal misfortune or natural disaster, and, on the other hand, due to underdevelopment of local capital markets and banking services, it has very limited access to money borrowing. In order to minimize those risks or to soften those constraints, the household adopts a strategy of diversifying economic/employment activities of its members. Migration by some household's members to another country, and particularly the remittances whose source is the employment of migrants in that country constitutes an important element in the diversity of household's members economic roles.

Irrespective on specific premises of individual theories, an underlying discussion on broad intellectual foundations for a migration theory is another important aspect of its development. Major researches' loci can be presented dychotomically according to four sources of opposition. According to the first of those sources, a view that migration

models can and should be abstract and of general applicability (e.g. Ravenstein, Stouffer, Todaro) is challenged by a view that it is a historical process that cannot be abstracted in time of specific social processes (e.g. Wallerstein, Zelinsky). The second source, which concerns the mechanisms of migration, contrasts an opinion that migration is an aggregate outcome of relatively independent individual actions (e.g. Lee, Todaro) with an opinion that those actions are largely determined by structural changes in society (e.g. Portes, Zelinsky). Consequently, the third source juxtaposes the models which claim that the main actors in pursuing individual acts of migration are individual persons (e.g. Todaro), and those which claim that it is basically collective actions (and strategies) undertaken by households or families (e.g. Massey, Stark). Fourth and finally, the nature of migration determinants is such that some of them are applicable to the initiation of migration (e.g. Piore, Stark, Wallerstein) while some others to the perpetuation of migration (e.g. Massey, Taylor). At present there are still no clear paradigm nor a prevailing stream in migration theory.

The evolution of migration theory reflects the fact that during more than a century of systematic migration studies those studies have undergone significant change with regard to the construction of basic concepts, data sources, analytical approaches and techniques. The term "migration" means now something rather general from which, according to various geo-political, economic and geographical contexts, specific concepts are derived. Unquestionably, migration is conceived as a process, and whereas sometimes it is considered as being limited to an individual change of residence, it is more and more often seen as a long (even the life-long) and metamorphic chain of "events". On the other hand, from the point of view of decision-making and execution, migration unit can be either an individual or a group of persons (family, a team of workers, a group of community members or co-ethnics, etc.). Moreover, involuntary migration has emerged as a distinct separate concept in those studies. Finally, the concept of migration has become increasingly flexible as far as the time of individual migration and its legal status are concerned. In addition to traditionally conceived settlement or long-term movements, being as a rule of regular character, migration studies have more and more readily inquired into relatively very short-term movements, including those undocumented. All this has profoundly affected the requirements towards the data and research methods. A major change has been a gradual drifting away from official records (population census, population registry, etc.) as the main source of information to the advantage of specialized surveys. By this, linking the data on departures with the data on arrivals and tracing the total process of migration of an individual or a group of persons have become feasible, and a relative importance of qualitative data for migration studies has greatly increased.

Ethnosurvey might be cited here as an example of a complex new approach to the migration study, with its specific concepts, data sources and techniques of analysis. It is a multi-method approach to data design, collection, processing and analysis that simultaneously and in a complementary way applies ethnographic and survey procedures. The ethnosurvey involves a study in a number of purposefully selected migrant communities in regions (countries) of origin and destination. A pioneering effort has been made by Massey (and a team) who in 1987-1992 carried out a study in 25 communities of migrants departure (western Mexico) and at the same time in a number of places of those migrants' destination (the United States).

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