

## **A SYNTHETIC MODEL OF MIGRATION**

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Published in 2006 as chapter 12 of P. Kok, D. Gelderblom, J. Oucho & J. van Zyl (eds)  
*Migration in South and Southern Africa. Dynamics and determinants*. Cape Town: HSRC  
Press

## Introduction

There seems to be a strong current of opinion that an overarching theory of migration will not be very useful, given the high level of abstraction that such a theory will involve (Arango 2000, Hammar 1995). Yet, despite the legitimate problem of level of abstraction, the alternative of continuing to pursue one-sided theories is not very attractive either. It seems perverse to continue with the exclusive pursuit of partial theories when we know very well that they are indeed partial. In the most sophisticated and elaborate attempt yet to provide an empirical test of theories of international migration, Massey and his collaborators (Massey et al. 1994, Massey & Espinosa 1997) found some, albeit varying, degree of confirmation for all the theories on offer. Clearly, each of them has something to contribute. This paper is written in the conviction that it is a worthwhile exercise to make an attempt at integrating these partial insights.

This paper therefore aims to combine into a single model the insights derived from a variety of theoretical approaches to migration. As such it is an attempt at theoretical synthesis, mapping the theoretical field of migration theory and connecting its main concepts. To this end, it identifies the causal factors involved in the different theories and specifies their mutual relationship. It further attempts to excavate the underlying assumptions of the different theories and to marry them as far as possible.

Special attention is given to the issue of why people do **not** migrate. The lack of a consideration of immobility has been one of the weak points of most migration theories up to now. In a context of vast, and growing, economic inequalities in the world, many backward regions still do not provide any migrants. Even where migration has started to take root, it is generally still only a minority that do migrate. Most models of migration find it difficult to offer an explanation for that; they can generally explain migration only once it has started to take root. As a result, the policy advice offered by migration theories is weak, which leaves governments in a reactive mode. This paper seeks to make a contribution to overcoming that weakness.

## The model

The model posits relationships among the following factors:

1. **Spatial reward structure.** At the most basic level, migration only takes place if two places become different with regard to their ability to satisfy human needs. Migration therefore responds to a spatial disequilibrium of some sort. In a pre-industrial setting, that can be the difference between winter and summer grazing for cattle. In an industrial context, the unevenness in the development of cities and the surrounding countryside makes city life more rewarding, at least as far as the economic welfare of potential migrants is concerned. At the same time, the commercialisation of agriculture will typically result in labour tenants or sharecroppers losing access to land. This implies that they lose a claim that they had with respect to a particular place, which makes their continued existence in that place more difficult.

2. **Individual characteristics.** The reward/entitlement structure interacts with individual characteristics such as sex, income, age education and occupation to produce individualised rewards.
3. **Individualised rewards.** The rewards attached to living in a particular place are distributed differentially. For example, the jobs open to Mexican migrants to the United States are largely unskilled. Mexicans with a secondary-school education do not have more cultural capital in the US than those with only a primary school-education (Massey & Espinosa 1997). As a result they are likely to prefer internal migration that offers higher rewards to their skills than cross-border migration that puts them in the same position as the uneducated. Before we can therefore decide what the objective life chances are of a particular individual in a particular place, we need to correlate that person's characteristics with the way in which the reward structure distributes life chances. This will allow us to establish how much benefit a person with particular characteristics will derive from moving to a particular destination, relative to staying put.
4. **Structural variables determining the decision making units.** These will determine the degree to which the individual can make an independent migration decision. A young, unmarried woman might have less control over her migration than an adult man, for example. Accordingly, not only her interpretation of the situation needs to be taken into account in understanding her migration behaviour, but also that of other household members. Except in the case of somebody who is single and living on his/her own, one can expect the migration decision to involve some degree of conflict and negotiation within the household, as individual and household goals are weighed up against each other.
5. **Information sources.** The potential migrant can only make a decision to migrate or stay behind once information is acquired about circumstances elsewhere.
6. **Perceptions, motivations and decision making.** In the case of factors (6) and (7) we are dealing with subjective matters on the micro and meso levels. These form the two stages of the decision making process. The individualised rewards and penalties generally need to be interpreted in terms of the migrant's biography, socio-cultural context and motivational structures so that they can enter into the decision-making process. The end-result of the decision making process is a clear intention to either move or stay.
7. **Migration intentions.** Once an intention is formed, it needs to be communicated to significant others, and their concerns and opinions dealt with.
8. **Filters.** These are factors that make it more difficult for particular categories of people to migrate (obstacles) or that facilitate their migration (facilitators). The most important obstacles are the costs of migration and power structures such as gender. The most important facilitator is the migrant network that can subsidise the costs of migration.

## **Spatial reward structure**

As indicated earlier, migration responds to the way in which rewards are structured between different places. If place B becomes more attractive to live in than place A, or if circumstances become bad in place A, people can be expected to move from place A to B. Under this heading we are referring to the pulls and pushes of classical migration theory. This may seem very straightforward, but actually it is not, and in this section I will attempt to clarify some of the complexities involved. To start off, it is necessary to distinguish between objective differences between regions and the potential migrant's subjective evaluation of these differences. Subjective perceptions will be discussed under the heading of perceptions, motivations and decision making, while objective differences will be discussed in this section. The distinction between objective and subjective differences is sometimes difficult to maintain - in this article however I will take objective differences to be those that are judged to be relevant in the migration scholar's considered opinion, while subjective differences are the differences as perceived by the potential migrant him/herself.

In a generic sense, pull forces are those things in both the destination and origin areas that are attractive to the potential migrant. The migrant responds to pull forces if s/he decides to move to a destination area because conditions there are more attractive in terms of high wages, good services, social connections, etc. The focus here is on the rewards attached to living in a particular place.

Push forces are more difficult to conceptualise. In general they refer to things in both areas that drive the migrant away. We can distinguish between the following types of push factors. A migrant may be driven away from a place because it is a bad place to live in, due to, among others poverty, unemployment, crime and violence. Adepoju (1995) gives a list of push factors responsible for emigration from sub-Saharan Africa, such as high population growth, structural adjustment policies and ethnic conflict. Alternatively, the migrant can be driven away because a requirement is imposed on him/her that is impossible to meet in the area of origin, for example hut and poll taxes in an area without a cash economy, necessitating wage employment elsewhere. This was a fairly standard response on the part of colonial authorities in Africa in the face of the unwillingness of African people to join the colonial labour force. This type of push factor is not common presently, and probably of more interest to historians.

The third type of push factor refers to changing land tenure arrangements which make it impossible for the migrant to continue living in the area of origin. The migrant can be evicted from land to which s/he previously had a right, due to the end of the sharecropping system, for example. In this case, migration becomes imperative - if you no longer have a place to stay, you have to leave. I discuss this issue again below. Another example is the consolidation of small landholdings into bigger units as a result of market forces or government policy.

Lee (1966) identified the existence of positive (pull) and negative (push) factors in both the origin and destination areas, making it clear that pushes and pulls work in both directions. A

potential migrant may be pushed away from an area of origin through lack of jobs, but pulled back again by social connections. Similarly a destination area may pull the potential migrant by offering economic opportunity, but push him/her away through anti-immigrant feeling and legal restrictions. This contradictory combination of forces can help to explain why migration is often circular, with the migrant returning home periodically and not committing to the destination area in a permanent fashion (Wilson 1972).

Most theories of migration accommodate push and pull forces in some way or another. There are major differences, however, in the way they go about this, specifically with regard to the nature of the pushes and pulls considered. Micro-economic theories focus exclusively on economic variables. Potential migrants are believed to be attracted by income differentials between regions, or by differences in the present value of life-time income streams (Sjaastad 1962, Chiswick 2000), or by differences in wage levels between regions, corrected for the probability of finding employment in the destination area (Todaro 1976). If the expected income gain to be derived from a move from place A to place B is higher than the costs of migration, a potential migrant is expected to move (Ritchey 1976, Bauer & Zimmermann 1995, Chiswick 2000, also see the discussion of the costs of migration below). Poverty and unemployment are therefore major push factors in the area of origin, and the possibility of employment and an improved income major pull factors in the destination area.

Although micro-economic theories have a certain amount of intuitive appeal, they have the drawback, however, that they give rise to predictions that are mostly at odds with observation. Micro-economic theories suggest that the greater the difference in expected income between two regions, the greater the amount of migration that would take place between them. It is, however, generally not the poorest countries contributing the largest amount of international migrants to the developed world, but rather those that are developing at a rapid rate (Sassen 1988:5-6, 94, Arango 2000:286). For example, micro-economic theories find it difficult to offer any explanation for why so many migrants left South Korea during the 1980s for the United States when that country was growing at a rate of 8 to 10% per annum (Sassen 1988). Within a country it is furthermore seldom the poorest who migrate, or the poorest regions that provide the greatest number of migrants (Lipton 1980 & 1988, Ritchey 1976:365-366). The policy advice that one can derive from these theories is consequently also wrong, or at the very least, oversimplified. Micro-economic theories lead to the conclusion that economic development in the poorer region, reducing the extent of inequality between the two regions, will reduce the amount of migration taking place between them. This is however an oversimplification (Sassen 1988, Massey 1988, Massey & Espinosa 1997:969). At least initially, economic development in a country or region is a great stimulus for outmigration from that country or region.

Social-structural theories of migration, mostly derived from a Marxist framework, provide an explanation for why this happens to be the case. Micro-economic theories assume that rural workers are mobile and available for migration, provided that the costs of migration can be met. This is not necessarily the case (Standing 1981:185). As I will point out in a later section, there are a large number of rural land tenure arrangements, for example sharecropping and labour tenancy, and social relationships between landlord and tenant,

such as debt bondage and paternalism (Standing 1981), that may immobilise peasants in the rural areas. These can retard the amount of rural-urban migration in a country, even in the presence of a dynamic modern urban sector. It is only when these are broken down that large-scale out-migration from the rural sector start to take place. Depending on the nature of this process, rural out-migration may take place more or less quickly. In some countries rural transformation leads relatively quickly to the commercialisation of agriculture and mechanization, which make many peasants superfluous on the land and force them to leave the rural areas. In other cases farmers are less capitalised, or the labour process on the farm is inherently more labour intensive, as in the plantation economy, so that they depend for far longer on a large and inexpensive labour force. In these cases, farmers will call for state measures, such as the influx control system in South Africa, that immobilise their labour force in the rural areas. Another pattern is where land tenure systems allow large numbers of rural people to retain access to residential (and some farming) land for a long period of time. An example of this in South Africa is the 'tribal' tenure system in the former homeland areas. Breadwinners are typically absent as migrant workers, while the rest of the household stays behind in these settlements. In all these cases rural development, in the form of the increasing capitalisation and commercialisation of agriculture, has the potential to create a large number of rural outmigrants in a relatively short time. Micro-economic theorists of migration, due to their inattention to social processes, are unable to offer an explanation for these occurrences.

Rural development is not the only form of area-of-origin development that can mobilise large numbers of migrants in a short time. Sassen (1988) describes how the development of export-oriented manufacturing in the Caribbean and South East Asia in the 1980s managed to create a large group of labour migrants from these countries to the United States. These areas received extensive foreign investment in manufacturing, and a large number of industrial jobs were created, thus reducing unemployment. Given the fact that growth rates were higher there than in the States, presumably the push factors involved in emigration to the United States should have been neutralised to some extent. Despite this, large-scale outmigration to the United States took place. According to Sassen (1988:116) export-oriented manufacturing created a large class of particularly women workers who for a number of reasons could no longer return to their home villages once they had worked in these plants. At the same time, these workers did not enjoy the prospect of long-term employment in these factories, since these factories prefer young women. Once they were laid off, these workers had nowhere to go, and provided a fertile recruiting ground for emigration.

The creation of a pool of potential emigrants is not enough to stimulate emigration to the United States, however, according to Sassen (1988:118). It was in addition necessary for emigration to become a viable option in the consciousness of these potential emigrants. This was provided by the experience of working in factories owned by foreign companies. A further factor was the growth of low wage jobs under conditions of globalization in 'world cities' such as New York and Los Angeles (Portes 2000:255). These low wage jobs were created in the service sector and in sweat shops and reflected the increasingly bifurcated employment structure of these cities. This provided the necessary pull factor for these potential migrants.

We can conclude this discussion of push and pull factors with the following observations. The neo-classical account is not wrong in its belief that migration responds to differences in welfare between regions. This pull force only becomes active as a cause of migration if workers are mobile, however. And this mobility only becomes a reality once development erodes immobilising structures, often in the context of push factors such as farm evictions. It is therefore wrong to focus on economic pushes and pulls to the exclusion of social structural factors.

### **Individualised rewards**

The reward structure discussed above allocates the rewards attached to particular places differentially, depending on the characteristics of the individual. Women can expect more, or fewer, advantages in a place than men. The same applies to young adults and older people, educated and uneducated, and so on. The objective distribution of life chances in particular places are relevant here and not the subjective experience people will have of these.

The theories that are applicable here are the same ones discussed in the previous section. The only difference is that we are dealing here with these theories insofar as they account for the selectivity of migration, based on the differential chances that are offered to people in particular places. We have already referred to the situation of the better educated. At least for internal migration, they are likely to realise higher returns by migrating to urban destinations than staying behind in the rural areas. For most of the better-educated, rural-urban migration is a precondition for realising a return on their investment in education (Rempel 1981:77, Connell et al. 1976:59-63). Because agricultural jobs are generally unskilled, rural-rural migrants are likely to have a lower level of education (Connell et al. 1976:65). The differences in rewards offered in rural and urban areas therefore help to explain the different kinds of migration destinations selected by people with varying degrees of education.

Women are a very prominent part of the labour force in export processing zones, where they are typically involved in the final assembly of products (Georges 1990, Sassen-Koob 1984). Female workers are in demand because there is a perception that they are less likely to join unions and are more suited to the repetitive assembly line work needed at this stage of the labour process. The increased demand for female workers results in increased female migration to these export processing zones (Sassen-Koob 1984). Female selective migration in these cases can thus be explained with reference to the demand-pull forces operating from the industrialising areas. In Mexico, for example, during the 1980s and 1990s women migrated to the northern border regions of the country where many American companies had built factories to take advantage of, at the time, cheap Mexican labour (Young and Fort 1994). These factories (called maquiladora factories) specialised in the final assembly of products for the American market and employed a largely female labour force. In recent years, Mexican export processing zones experienced increasing competition from products sourced in Southeast Asia, which reduced the number of jobs available and thus the pull forces responsible for migration.

### **Structural variables determining the decision making units**

From the perspective of middle class Western people, it seems obvious that the decision making unit in migration is the individual. However, this is often not an appropriate assumption for poor people in the developing world (Simmons 1986:137-138). Their migration is typically not the result of a purely self-interested decision taken by an individual migrant. It more often flows from a household decision directed at improving the welfare of the household as a whole. There are two reasons for this. The first is that it is necessary for household members to work together for their survival. In such a context individual goals are often subordinated to household goals. The second is that family structures are often very patriarchal, with the result that those with less power in the household, especially young unmarried women, have little scope for individual initiative.

It is to account for this situation that the household strategies approach was developed, mostly by anthropologists (Wood 1982, Brettell 2000). The new economics of migration, pioneered by Oded Stark (1991), is an economic formalisation of many of the ideas coming from the household strategies approach, as well as Gary Becker's household economics, and will be discussed here in the same breath as the household strategies approach. According to these approaches, many poor households, unlike middle class households, cannot depend on a single (or dual, as in the case of a married couple where both partners work) source of income. The jobs open to poor people are too insecure and provide too low an income for the household to depend on any single one of them. Poor households consequently combine income from a number of sources if at all possible. This may involve home-based enterprises, farming, informal sector activity as well as wage work. This process needs to be managed successfully if the household is going to benefit from it, which creates the need for a labour allocation strategy. Such a strategy involves the household in doing a couple of things.

In the first place, the household needs to balance its available labour resources with the jobs that are available, being mindful of the fact that domestic tasks also need to be performed (Chant & Radcliffe, 1992:22), and then allocate its labour as productively as possible. Surplus household members may be hived off to other households if at all possible. In Southern Africa, for example, children may be 'lent' out to other households: young boys as cattle herders and girls as domestic help. Some members may have to do a 'double shift', as in the case of a women who combines a job with domestic responsibilities. If the household has access to agricultural land, a decision needs to be made about who is going to look after it. The household also has to decide which member stands the biggest chance of finding waged work.

Wage work is often not available in the immediate vicinity of the household, with the result that the household's labour allocation strategy may demand that one of its members become involved in circular migration. When it comes to migration decision-making, the household is fundamentally different from the individual in one important aspect, which is often not recognised. The individual has to decide if a possible destination area is a more advantageous place to live in than the area of origin. This is captured by the concept of 'place utility' (Wolpert 1965). If more utility is derived from place B than place A, the migrant leaves for that place. One place, and one place utility, is switched for another one. The household does not face the same constraint as the individual, however. It does not

necessarily lose the utility of its original place of abode if a new one is added to its portfolio of places. *It is not forced to substitute place utilities, but can combine them if it so desires.* Because different household members can live in different places, utility can be derived from all of them. This implies some degree of circulation so that household bonds can be maintained and remittances delivered. Clearly, if a household member settles permanently in a destination area (for example, if a migrant husband leaves his rural wife and marries an urban woman) the household loses that member as well as the place utility derived from that member's spatial positioning.

One example of the combination of place utilities is the following: it is possible for a household to take advantage of the earnings possibilities to be found in urban areas while at the same time consuming the money earned there in the rural areas (Hugo 1985:78). This is done by sending only the wage worker to town and retaining everybody else in the rural area. The rationale for consuming in the countryside is that consumption costs are often lower there with the result that the money earned in town stretches further (Hugo 1985, Nelson 1992). Consumption costs are lower, amongst others, because water and firewood can often be collected from communal sources. Accommodation is also cheaper.

The home base from which circular migration is launched does not only have to be a rural area. Todes (1998) describes how the town of Newcastle in KwaZulu-Natal serves as a home base for many migrant labourers. Newcastle is attractive for this function because it has better services than rural areas, it is considered safer for a family than the metropolitan areas and the conditions for local income generation are more favourable (Todes 1998:46-47). Households also retain Newcastle as their home base, even after the breadwinners may have lost their jobs there, because they have already invested much in their houses in that area. Because of their association with reproductive activities, women are more likely to stay behind in Newcastle, with men leaving as circular migrants. Chant (1992) describes a very similar situation in the case of female migrants to towns in the province of Guanacasteco, Costa Rica. Women move to these towns because land for housing is more readily available. Land invasions are more likely to be tolerated here than in the larger cities (Chant 1992:61). Other consumption costs are also lower. In addition these towns are closer to the areas of origin of the female migrants and this allows them to retain more links with their networks of family and friends. While the women (and their children) mostly stay behind in the Guanacasteco towns after migration, men leave these towns as circular migrants to work in seasonal agriculture and in the bigger cities, such as the capital city San José.

Migration research among poor people in the developing world therefore cannot rely only on an investigation of the perceptions and motivations of the potential migrant, but also needs to take the perceptions and motivations of the household head into account. The second point to be noted is that the decision-making process often involves conflict and negotiation between household members, as the interests of various individuals and that of the household are weighed up against one another (Wolf 1990).

At the same time, however, the perspective of the household strategies approach needs to be broadened. It has been effective in illuminating the decision-making of households up to a point; nevertheless it has been constrained by the approach it has adopted. One problem

is that it focuses on household goals to the exclusion of individual goals (Wolf 1990). Although the degree of individual autonomy in the face of household goals varies, we need to focus on the process of negotiation and conflict that is bound to occur as individual and household goals and interests are aggregated within the household. The other problem has to do with the way in which the household's decision making is conceptualised, as seen through the lens of micro-economic assumptions. This is addressed below.

### **Information flows**

People can make decisions regarding their own migration (and that of others) only on the basis of the information at their disposal regarding these objective factors. Illiteracy, poverty and lack of education are major obstacles to the diffusion of knowledge about migration opportunities (Hammar 1995:181). Besides the need for potential migrants to be freed from immobilising social structures, the fact that people in poor communities may simply not be aware of opportunities elsewhere is thus a further reason why development is often a precondition for migration to take place. By increasing information flows into poor communities, development makes a further contribution to stimulating migration flows.

Besides the mass media, the most important information source regarding opportunities elsewhere is friends and family members who live in the destination area and who form part of the social network of the potential migrant. Because poor people live in information-poor communities, and because they have less access to information from sources such as the internet and newspapers, they are especially dependent on their social ties to provide them with information. These provide information about accommodation and possible job opportunities in destination areas. Information dissemination is the result of the social interaction that takes place between network members. They keep in contact through visits, phone calls and letters while information is disseminated through gossip or as a result of more directed enquiries. The information-disseminating function can be so effective that potential migrants can find jobs through the agency of network members before they leave the village, as Banerjee (1983:195) reported in his survey of migrants in Delhi in India.

These information flows also have another function. By exposing the potential migrant to new consumption standards that cannot be satisfied by the local economy, the motivation to migrate is increased (Sassen 1988, Portes 2000). Stark (1991) explains this process with reference to the concept of relative deprivation. Potential migrants start feeling relatively deprived when they notice their reference group members coming back from their trips abroad loaded with consumer goods. Feelings of dissatisfaction with their current state are now induced in them and they may become motivated to migrate.

### **Perceptions, motivations and decision making**

Up to now we have dealt with objective factors that provide a context within which a decision is to be made regarding migration. It is now time to investigate the difficult issue of the subjective dimension of the causes of migration. This is a difficult question because the subterranean world of motivation is difficult to plumb. In this section we are dealing with

how the information acquired through mass media and social networks is evaluated, given the motivational structure of the decision maker, to produce intentions regarding their own migration, as well as decisions regarding the migration of others. We are dealing here with the processes of interpretation, evaluation and motivation that, in combination, may produce a decision regarding migration.

There are a variety of theories that address these issues. Some, such as the micro-economic theories, focus on decision making but do not explicitly address motivation. Others look at motivation without pursuing decision making. Let us start with the micro-economic theories of migration. Here we can distinguish between two kinds of theories, those that take the individual as their point of departure and those that consider the household to be the ultimate decision-making unit. According to the more traditional, individualist theories, potential migrants aim to maximise only their own welfare; for household theories, specifically those included in the 'new economics of migration' (Stark 1991), the aim is to maximise the household's economic welfare. For individualist theories, migration decision-making is about comparing two places and deciding which one offers the best chance of maximising economic welfare; for household theories, as was pointed out earlier, the decision is more complex. It is about the value that can be added by an additional place in the household's portfolio of places, in the context of an attempt to optimise a number of aims, such as risk minimisation, income maximisation, and so on.

It should be clear that micro-economic theories have an implicit theory of human motivation. They assume a priori that people act in their own, or their household's, self-interest, which is defined purely in economic terms. The possibility that people can also be motivated by other things, such as values, the need for self-actualisation, or by subconscious fears and desires, is not considered. They furthermore do not take into account that actors have to interpret their own self-interest before it becomes accessible as a motivating force for their actions – a point made by the early 20th century German sociologist Max Weber (1991:280) in his commentary on Marxist theories. In this interpretation, actors are guided by the views (and prejudices) of their cultural community. Micro-economic theories can therefore be criticised for imputing motives to potential migrants, rather than investigating them empirically.

This criticism applies to both individualist and household theories in the new economics of migration. The latter have replaced the individual as the primary decision-making unit with the household, but in the process it has not fundamentally departed from the basic neo-classical assumptions of the micro-economic theories of migration. It still largely assumes that its unit of analysis is motivated only by the goal of maximising its economic welfare. The household is just the individual writ large, weighing up its options to arrive at an economically rational decision.

The most detailed attempt yet to investigate motives in migration rather than imputing them has been the work of Gordon De Jong (De Jong & Fawcett 1981, De Jong 2000). Departing from the expectancy-value model, as updated in social psychologist Icek Ajzen's theory of planned behaviour (1988), De Jong gives pride of place in his theory to the migrant's evaluation of the probability of attaining a number of preset values, such as income/wealth, comfort, and so on, in the destination area as opposed to the area of origin.

These are said to be the major determinants of intentions to migrate, which in turn are supposed to predict actual migration behaviour. Another important determinant of intentions is family migration norms, which are an indication of the potential migrant's evaluation of how family members view the proposed action of migration. De Jong's model contains an interesting deviation from Ajzen's theory of planned behaviour: it does not have space for the variable of perceived behavioural control, which is what Ajzen (1988:132) thinks distinguishes his new theory from his previous theory of reasoned action.

The values used in the model were derived from an analysis of the reasons given by respondents for their migration behaviour as these emerged in surveys, as well as migration theories (De Jong & Fawcett 1981:39-43). The authors comment on the importance of the question of why people do not move, decrying the lack of research on this question (the only finding in this regard was that social bonds in the area of origin lead to a degree of inertia). Although they include the affiliation value in their list of values, they otherwise assume that the values explaining why people move will also explain why people do not move. This seems to be a problematic assumption.

There is what I would call a mover's bias implicit in De Jong's choice of values. In one of its latest (2000) incarnations, De Jong's model contains four values. These are income/wealth, comfort, stimulation and affiliation. If one looks at a typical migration stream between an area of origin and a destination area, for example a rural area and a town, it is safe to say that of these four, the destination area would probably rank high relative to the area of origin on at least two of these (income/wealth and stimulation) and possibly on a third one as well (comfort). In the light of the fact that most people do not move, the over-representation of mover's values does not seem justified. Consequently I feel that it is necessary to add two more values to correct this. These are security and identity. 'Security' refers to the attraction of the known and the predictable. Under 'identity' I understand feelings of belonging, making up the potential migrant's conception of self (Martin 1995). In the next few paragraphs I shall elaborate on each of these two concepts and their relevance to a theory of moving and non-moving.

In the sense of attraction to the known, 'security' is not dissimilar from Anthony Giddens's notion of ontological security. According to Giddens (1979), people have an unconscious need to maintain their routines. Disruption of the familiar and predictable ways of life produces ontological insecurity, which is experienced as feelings of anxiety. Modern societies are especially prone to producing ontological insecurity, because of the destruction of tradition (Giddens 1981:194). Since migration implies a disruption of routines and a break with familiar places, it is likely that the need for security could help to explain the prevalence of non-migration over migration. Since development in the area of origin is likely to disrupt established ways of life, the difference between the area of origin and the destination area in their respective capacities to ensure continuity in life will become less (provided of course that the destination area is not too dissimilar culturally from the area of origin). The obstacle to migration presented by the need to maintain ontological security will therefore also be less, which is an added reason why development is associated with increased migration.

'Identity' is relevant to a theory of migration and non-migration because people can be

attracted to a place based on who they think they are. They may believe that they belong to a place because people there speak their language and share their culture (Hammar 1995:180). The fact that their families might have a history in a particular place going back a number of generations adds to the attraction of a place. Living where your ancestors are buried, or at least being able to go back there to be buried yourself is an important attraction for some people (Hammar 1995:180). Added to this is the perception that it will be disloyal to even think of moving away. Identity does not only cause people to remain in a place, but can also be a reason for their migration, as in the case of committed Zionists who migrate to Israel. Identity helps to explain why migrating once makes it easier to migrate again: if you have already gone through the exercise of breaking ties with your home ground once, doing so again is less traumatic.

Before I go further I need to consider the relationship between these two concepts and the other values used in De Jong's theory, specifically the links between security and stimulation on the one hand and identity and affiliation on the other. On a superficial reading of the first pair of concepts, security may seem to be merely the opposite of stimulation, because stimulation implies novelty and security implies sameness. If this is indeed the case, security is superfluous in the theoretical scheme since the absence of stimulation would signify security. This is not altogether true however. To begin with, De Jong (2000) defines stimulation in terms of variety, and not novelty as such, although that does not say much as variety probably entails a degree of novelty. Security as I defined it above is associated with routinized behaviour. It has to do with habits and customs, in other words particular behaviours repeated at regular intervals. It has to do with getting up at particular times in the morning, eating breakfast at designated times, and so on. It is linked to identity because it also implies a familiar culture and familiar places. It should be clear that there is nothing inherently contradictory in having a varied life amidst great routinization and familiarity. Eating different kinds of food on regular days is a way of combining both variety and regularity, for example. In fact part of the attraction of the familiar way of life may be the scope it offers for variety.

Identity has to do with a sense of belonging, so does affiliation. The difference between the two is that affiliation refers to attachment to a small group of friends and family whereas identity is a wider concept including attachment to place, culture, class, country and nation.

Two issues remain, both of them relating to the question of the operationalisation of the concepts of identity and security in a model of migration. The first issue, for which I do not have an answer yet, is whether they should merely be added to the list of values so that expectancies of the likelihood of their realisation in the area of origin and the destination area respectively can be derived, similar to what is done for the other four values in De Jong's model. This should be the case if they enter into a conscious process of comparison between the two areas in the mind of the potential migrant. There is some justification for doing so, as pointed out in some of the examples above. A committed ideologue may rate one place above another in terms of its agreement with a set of values, as in the Israel example above. In many cases, however, the identity and security motives create such a strong attachment to the area of origin that a conscious comparison of the area of origin and possible destination areas is rendered impossible. In other words the attachment to a familiar place may be so strong that moving away is not an option. In this case a comparison

between different places becomes meaningless, and the logical place of security and identity in the model is before the comparison between places in terms of value expectancies, determining that decision making with regard to migration is not going to take place.

This points to a fundamental problem with decision making models of migration, such as the micro-economic theories and De Jong's model. Moving is generally the result of a conscious decision, but not moving doesn't have to be. Just continuing with one's daily routines over time is enough to produce the result of 'not migrating'. Although people can indeed make a conscious choice to stay rather than move, in many cases such behaviour is not the result of a decision. Consequently a decision-making model is not always appropriate to explaining the non-migrating side of the moving/non-moving conundrum. I therefore specify the outcome of no decision-making as one of the outputs of the model, indicating that for some individuals the migration process is for subjective reasons not an option at this stage.

This leads up to the second methodological issue. It would appear that not migrating is, in principle, much more difficult to understand on the motivational level than migrating. Deep-seated fears, such as the fear of failure or the fear of the unknown, are much more likely to play a role here. This increases the possibility of rationalisation being triggered in the research context. Because the failure to pursue opportunities elsewhere has the connotation of being a 'loser', failed migrants might rationalise their inabilities, whether these are due to the costs of migration being too high, or their fears of the unknown being too strong. If one cannot get something, it is easy to convince oneself that one never wanted that thing in the first place, that is to rationalise. There are perspectives in psychology that are extremely sceptical of the likelihood that people's real, as opposed to their stated, motivations will be easily accessible to the researcher. Psychologists in the psychoanalytic tradition would point out that, due to a variety of defence mechanisms, people may not be completely aware of their real motives, or they may make an active effort (known as rationalisation) to present their motives in socially acceptable ways and therefore hide their real motives.

De Jong and Fawcett (1981:44) are not unaware of this criticism. Part of their (1981:46) answer is that migration is a more rational form of behaviour than say, fertility. It is consequently more likely that a researcher can get access to the motivational structures of aspirant migrants than of would-be parents, for example. It can also be pointed out that the questions used in the value expectancy model to plumb reasons for moving, only do so in an indirect manner. Respondents are not asked upfront why they are leaving or staying, but to rate their own community relative to another. As a result it is less likely that rationalisation will be an issue here. Nevertheless there is a case to be made for anthropological fieldwork and other forms of in-depth observation in this regard. In order to understand the rationalisation of motives, some understanding of the cultural context is essential. Rationalisation uses cultural scripts that provide already worked out motives, and these are more accessible to qualitative research (reference).

## **Intentions**

The process involved here is the expression of a definite and stable intention by the

decision-making unit to migrate or not at a specific time in the future. If the decision-making unit is the individual, one can expect the potential migrant to communicate this decision to others in the household. This may involve a degree of conflict and negotiation, which might have the effect that the original intention is withdrawn.

## **Filters**

### **a) Obstacles**

We discuss two sets of obstacles to migration here. The first and most important is the costs of migration and the second is immobilising social structures in the area of origin. These obstacles will enter into the process of migration in three ways. In the first place they will, as we have seen, influence the interpretations people have of their own circumstances in the form of rationalisations. Respondents will tell first themselves, and then the researcher, that they never wanted to migrate in the first place, due to whatever reason they might advance as socially acceptable. If people do not rationalise their inabilities and still believe they want to migrate, these obstacles will affect people's intentions to migrate. If this does not happen, and the aspirant migrant does not change his/her intentions, these obstacles will cause the migration process to be abandoned. In this case the aspirant migrant has an unrealistic conception of his/her actual situation, or unexpected obstacles creep in (see Gardner et al. 1986) for an interesting analysis of these).

#### Costs of migration

Lipton (1980:9) identifies the following monetary costs as relevant to the decision to migrate: transport costs, the cost of lodging in town while looking for work and the costs associated with acquiring information about work and housing opportunities ("likely to be higher for the illiterate, contactless or inexperienced" - Lipton 1980:9). Illegal cross-border immigrants face the additional cost of paying the people smuggling them over the border and bribing officials to legalise their papers. The opportunity cost of migration, that is the earnings lost while the migrant is in the process of relocating has to be taken into account as well (Chiswick 2000:62).

In the micro-economic literature, the costs of migration are generally seen as an obstacle to migration only if they are more than the benefits that will flow from migration (cf. Chiswick 2000). In that case, migration will not improve the economic position of the migrant, thus removing the incentive to migrate. In all other respects, labour is supposed to be mobile; willing and able to go to where rewards are highest. The possibility that the costs of migration can be a barrier to migration simply because they are too high does not arise, as a) at least in their money form, these costs are not thought to be very high (Sjaastad 1962) and b) it is generally assumed that potential migrants have access to capital markets and can finance these costs. To start with the first of these two points. How high or low the costs of migration are cannot be decided upon in isolation of the income levels of a particular group of potential migrant. Micro-economic theories do not consider the money costs as a proportion of the income of different classes of potential migrants, but think in terms of average incomes. Consequently the possibility that, in the case of the lowest income groups, the money costs relative to the income of the group may be too high to make migration an

option does not arise for them. There is therefore probably a threshold income below which migration is ruled out as an option - below this income migrants would be unable to afford the costs of migration.

As we said, micro-economic theories assume that potential migrants have the ability to borrow the difference between what they have available and the total amount of the costs. As Stark (1991) has pointed out, this is a problematic assumption in the case of the poor. Banks generally do not want them as customers, so they do not have overdraft facilities. If they do borrow it is from money lenders at prohibitive interest rates, or from friends and family as we shall see later. It therefore seems that the monetary costs of migration can indeed act as a disincentive in some cases. In fact, the tendency for migration to select people in terms of their income suggests as much.

In the discussion of the costs of migration it is necessary to keep in mind that these costs are not constant, but are affected by the distance of the migratory move and changes over time (Massey 1988). The connection between distance and costs helps to explain why the poorest are more likely to migrate over short distances (DaVanzo 1981:111, Population Information Program 1983:M-255, Bauer & Zimmermann 1995:105). Transport and information costs in particular vary with the distance of the migratory move. On the other hand, subsistence costs incurred while looking for work are not affected by distance.

The impact of distance is not, however, the same over time. Due to faster, and increased, telecommunication links, and improved transport facilities, the time and effort needed to overcome distance is reduced. These changes reduce transport costs, and increase the amount of information people have about migration destinations. The implementation of universal education, with its impact on literacy levels and thus the amount of information at the disposal of people, similarly reduce the costs of acquiring information about distant places. As a result the geographical distance between places becomes less of an obstacle, and, for all practical purposes, that distance shrinks.

While the costs associated with the distance of the migratory move are reduced (that is transport and information costs), others may rise over time. If unemployment levels in destination areas increase, as has indeed been the case in many developing countries over the last thirty years, it takes longer to find work (we are referring here in particular to internal migration, but the same thing can happen in the case of international migration). If this is added to increased costs of living (as a result of food and other subsidies being withdrawn due to, among others, structural adjustment policies) the costs of subsistence while looking for work increases. Due to the variability of the costs of migration, it is therefore necessary to get an idea of what these costs are at a particular moment, and then correlate these with income levels. It is only in this way that one would be able to establish the threshold income below which migration costs are an obstacle to migration.

#### Legal restrictions

It is obvious that legal restrictions on in-migration are an obstacle to migration. This is mostly the case in international migration, but in South Africa influx control policies (Gelderblom 2003), and in mainland China the household registration system (Wang, Xuejin

& Danching 2002), restricted the amount of internal migration in these countries until the early 1980s. Currently, legal restrictions largely affect only international migration.

Opinions differ with regard to the impact of these restrictions (Hollifield 2000). Scholars who depart from a globalization framework tend to downplay the impact of legal restrictions on international migration, although there is something of a contradiction here. We witnessed the worldwide deregulation of capital markets in the 1980s and 1990s, which has led to an explosion in the intensity of capital flows across borders. This increased mobility of capital has not been matched to the same extent by the increased mobility of labour, however. In contrast to their willingness to reduce their restrictions on capital flows, states were much less likely to lift their restrictions on labour flows (Hammar 1995). This has increased the power of capital over labour, as employers have an option that is denied to their employees. Big business can leave a country if conditions are not to their liking; workers find it much more difficult. Portes (2000) calls this the 'capital is global, labour local' scenario. The insights to be derived from this contradiction have not really been pursued by globalization theorists however, and there has been much more emphasis on cross-border movements of people than on state restrictions on migration.

In contrast to this, state-centric explanations give much more attention to the independent impact of state policies on international migration (Hollifield 2000). They are interested in the coalitions of interest groups, the legal and cultural context, and the perceived threats to social solidarity and security that can make a state more or less receptive to international migration. Especially issues of security have come to the fore recently as causes for immigration restrictions, as is well-known.

We shall not pursue the explanations for immigration policy here. It is enough to note that the intensity with which states police their boundaries vary and that this will have a concomitant impact on the ease of migration. In some cases, these restrictions are not very effective and they become merely another cost of migration, as the potential migrant now has to pay money to be smuggled across the border and to bribe immigration control officers. Migrants are also adept at changing the legal definition of their migration when needed. As one avenue of legality is closed they often open up another. This can be seen in the large number of asylum seekers currently seeking entry into EU countries (Hammar 1995). On the other hand, if states are willing to expend the necessary amount of resources and if the legal climate is right, the effectiveness of migration controls can be increased significantly. The recent clampdown in the United States on illegal immigrants from the Middle East bears witness to this.

#### Social structural restrictions on mobility

In the section on the spatial reward structure, I referred to the impact of immobilising social structures during the initial stages of economic development. These typically change as the rural society becomes disorganized due to pressures such as the commercialisation of agriculture, from a rural pull back to a rural push out of the rural areas. In this section I will give more attention to the other immobilising factor, which is of course gender. Gender restrictions are highly contested in many parts of the world, and, like the above social structural restrictions such as indebtedness, they are inconsistent with the liberal freedoms

associated with ideal-typical capitalism. Just like these other restrictions they can co-exist with capitalist development for long periods of time. Examples of the constraining effect of gender is the stigmatisation of independent female migrants to town as prostitutes in parts of West Africa (Chant & Radcliffe 1992:14, Brydon 1992:99) or cultural traditions such as seclusion which, in parts of South Asia with a strong Islamic influence, make independent movement impossible for women (Chant & Radcliffe 1992:7). According to Ilcan (1994:567), in the village of Sakli in northwestern Turkey, "it would be culturally impossible for a woman to travel by herself to seasonal wage work." She observes that "[I]n Sakli, it is considered inappropriate for women to work outside the village, as it is believed that a woman's duty is to look after her family and the fields."

## **b) Facilitators**

Recruitment agencies often play a role in stimulating a migration flow between an area of origin and a destination area (Georges 1990:81). When the cost of migration is very high, workers have at first to be assisted to migrate. Recruitment agencies do this by providing a job placement service and by assisting with the transportation of the migrants. This is especially so in the case of migration of unskilled labourers over national borders. The bracero program instituted by the American authorities after World War II to attract Mexican workers into low-wage jobs in agriculture and industry is an example of this. Closer to home the activities (since the end of the previous century) of the Witwatersrand Native Labour Association (WNLA) to recruit workers from the subcontinent of Africa for the South African gold mines comes to mind. Labour recruitment is not restricted to international migration however. In South Africa, labour bureaux were scattered all over the former homeland areas of South Africa until the 1970s, by which time the country started to move from a labour shortage to a labour surplus economy and it was no longer necessary for industries to recruit people in that way.

As the migration flow matures and as the first migrants become established in their new home, networks start to form between the area of origin and the destination area. Previous migrants are now in a position to sponsor the migration of family members, thus lowering the costs of migration. The initial migration flow, started off as a result of organised recruitment, now calls forth additional migration (Boyd 1989:645, Massey 1988, Light, Kim & Hum 2000). What is ironic about this is that the new migration flow often occurs when the authorities no longer wish to encourage migration, either because of a downturn in the local economy or because of anti-immigrant sentiment. By that time a migration flow has become institutionalised between the two areas that continues despite the ending of recruitment or even more active border control measures to limit migration (Boyd 1989:645). This is why Boyd (1989:641), among others, claims that "[O]nce begun, migration flows often become self-sustaining, reflecting the establishment of networks of information, assistance and obligations which develop between migrants in the host society and friends and relatives in the sending area."

Migrant networks can best be understood as institutions (Guilmoto & Sandron 2001). Social institutions consist of rules of behaviour that structure a particular aspect of social life (Gelderblom 2003). In the case of migrant networks, these rules specify how network members should treat each other. They define who is part of the network and who is

excluded (network membership is based on pre-existing loyalties such as friendship and family connections), the basis of the network relationship (mutual help), the sanctions that are applied in case of deviance (it can range from a reprimand to exclusion from the network), and so on.

The main function of migrant networks is to subsidise the costs of migration and thus to increase the amount of migration taking place. Consequently one would expect their role to be more salient in cases where the costs of migration are high (that is over longer distances and in the case of international migration) and where people are poor. In this respect they also help to finance the trip. It was pointed out previously that the poor do not have easy access to credit. Migrant networks help to overcome this disadvantage by pooling the resources of network members and advancing the necessary cash. Their role is not restricted to the facilitation of migration, however. Other functions are a) to act as conduits of information linking the origin and destination areas and b) to ease the entry of the new migrant by providing accommodation, jobs, advice on how to cope in a foreign environment and friendship (Gelderblom 2000).

Migrant networks tend to link a particular area of origin and a particular destination area. The place and occupation where the first migrant from a particular community ended up is where new migrants from that community will be channelled to. Because network resources have been invested in making a particular destination area more receptive to new migrants, migrant networks impart a degree of inertia to migration streams (Gelderblom 2000). As Guilmoto & Sandron (2001) point out, if migrants are forced to innovate, because a particular destination area or a particular kind of occupation is no longer a viable option for new migrants, these innovations will be around the margins of the existing structure. New migrants will tend to go to areas close by, relying as much as possible on existing network resources.

## **Conclusion**

Constructing a synthetic model of migration is certainly going to be an ongoing occupation. Synthesising the vast and complex body of work represented by migration theory will always be an ambitious undertaking. Models also need to adapt to account for changing, and often unexpected, circumstances. I will here refer to only a few of the many issues that need to be confronted.

More attention needs to be given to working out the relationship between the micro-level issues of migration motivation and decision-making on the one hand and the macro-forces of social transformation on the other. Combining the long term, historical perspective on the rise and development of migration streams with the more short term focus on current migration patterns will pose special challenges. Macro variables such as information flows are, by definition, extended in time and space. The time-scales at which macro variables change, as well as the distances over which they are effective, clearly transcend variables on the individual level such as motivation, decision-making and intentions. Here the immediate environment and present circumstances weigh more heavily. It is, in addition, not always easy to combine the more historical, qualitative data gathered at the macro level with micro level data that can, in many cases, be expressed more easily in a quantitative format. A last

problem is that the aims of macro and micro level analysis typically differ. In the case of macro analysis, the aim is often to gain an overall understanding of the origin and development of migration streams, while the intention of micro-research is more typically to explain and predict migration flows.

I will not discuss the last problem here beyond noting my skepticism about attempts at prediction in social science (see Bhaskar 1978, Manicas 1998). As far as the other problems are concerned, one could restrict the use of macro variables to an historical interpretation of the origin and maturation of migration streams. The justification for such a position is that such variables are especially important in explaining why a migration stream is absent in a specific case. If this was a viable option we could discard the macro insights when we are dealing with an established migration stream and focus only on micro variables. While this will simplify the use of the model tremendously, it is not really possible. Macro variables are important not only in explaining why a migration stream exists between two places, but also in explaining why a particular person migrates, or does not migrate in the presence of an existing migration stream. The task of combining micro and macro variables into empirically useful models therefore remains.

More attention needs to be given to working out the relationship between the micro-level issues of migration motivation and decision-making on the one hand, and the macro forces of social transformation on the other. This involves synchronizing the different time scales involved. Combining the long term historical perspective on the rise and development of migration streams with the more short term focus on current migration patterns will pose special challenges.

The mutual influence between the spatial reward structure on the one hand, and subjective motivational structures and social networks on the other hand also needs further study. This involves answering questions such as the following:

- How do networks respond to a changing economic climate, as represented by, for example, the impact of structural adjustment policies in Africa? Meagher (1997) has provided a fascinating discussion of this in Northern Nigeria; her contribution needs to be extended by case studies in other parts of the world.
- We should investigate the reaction of decision makers on the micro level, such as households and individuals, to legal and other restrictions on migration. We need more studies such as those of Massey and others on how social networks can overcome restrictions on mobility by utilising their social capital. At the same time we need more information on how the social capital essential to these micro level strategies may become devalued as networks develop and perhaps decline, thus limiting the migration enhancing capacity of networks. Not enough attention has been given to studying the dynamics of social networks over periods exceeding the short term.
- What impact do objective forces, such as information flows, have on value systems and motivational structures? Stark's (1991) study of the role of relative deprivation in migration decision making is one example that can be followed up.

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