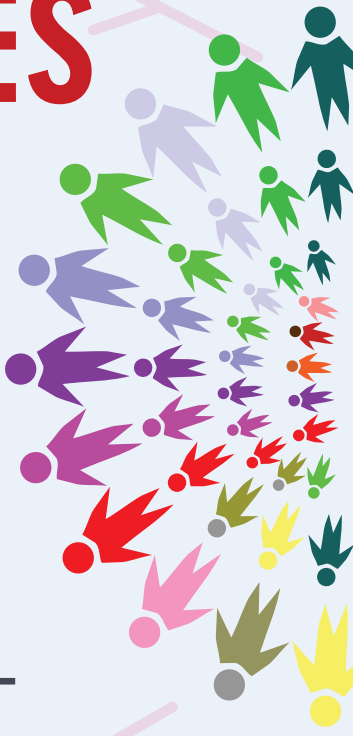
SOCIAL REMITTANCES AND SOCIAL CHANGE

FOCUS ON ASIA AND MIDDLE EAST



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Focus on Asia and the Middle East

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Preface

Money is not the only thing that migrants send back to relatives, family or other beneficiaries when they move to another country. Many intangibles, or 'social remittances', are transmitted back to the home country, such as ideas, lifestyle choices, social and political preferences, behaviors, and modes of interaction, etc. Similarly, such intangibles may be transmitted from the home to the host country. Transmission of social remittances is likely to generate social changes in the sending and receiving countries. Unlike money, which can be seen and counted, however, social remittances are much harder to define and quantify. Past research shows that scholars from many different fields are intrigued by the concept but use a wide range of methodologies to operationalize and analyze it.

The goal of this book is to unravel the complexities and enhance the understanding of social remittances for a region where such knowledge is particularly deficient. We focus primarily on Asia and the Middle East. Our aim is to add to the existing knowledge about the types, nature and frequency of social remittance diffusion between individuals, families and communities in home and host countries. A related aim is to understand the social changes and impacts that may have resulted from social remittance flows.

This book is based on a series of papers that were presented at a conference organized by the Center on International Migration, Remittances and Diaspora (CIMRAD) at the Lahore School of Economics in Pakistan in February 2023.

The papers benefitted from insightful comments made by discussants at the conference. I would like to thank Dr Rashid Amjad, Professor Peggy Levitt and Dr G. M. Arif for their critical reviews of the papers. I am also grateful to Dr Azam Chaudhry

(Lahore School of Economics), Dr Jonathan Addleton (FCC University), Mio Sato (International Organization for Migration), and Akram Ali Khawaja (Bureau of Emigration and Overseas Employment) for chairing various sessions at the conference.

CIMRAD director Dr Rashid Amjad was a vital force behind this project, from conception of the idea to the completion of this book. Several of my colleagues, including Memoona Qazi, Samar Quddus, Almazia Shahzad and Zahra Mughis provided invaluable assistance. I am grateful to each one of them. I am also grateful to Maheen Pracha for her meticulous copyediting of the manuscript.

Finally, I hope that this book will help in advancing our knowledge of a relatively under-researched area in migration studies.

Nasra M. Shah
March 2024
Lahore School of Economics

Contents

Chapter 1

Introduction

Nasra M. Shah

When a person moves, temporarily or permanently, from one community to another, they bring with them many of the ideas, values, beliefs, and behaviors they acquired in their native culture. On arrival in the host country, the migrant is exposed to a whole new range of cultural prescripts. Successful integration and performance in the new environment require a certain degree of re-socialization that may in fact challenge or negate the values and beliefs formerly held dear. The migrant must then negotiate with and adjust to many new realities. In time, the ideas of the host country may be adopted to varying degrees, depending on the circumstances of the migrant, and may be transmitted back to the home country.

Continued interaction and engagement with the home country is typical of many migrants, especially in the earlier phases of the migration trajectory. Such interaction results in specific cultural diffusion, described by Levitt (1998) as 'social remittances' in the form of 'ideas, behaviors, identities and social capital that flow from receiving to sending countries.' Thus, a person's definition of appropriate and suitable norms may be re-formulated by exposure to the destination country's norms, spanning social, psychological, philosophical, political and religious ideas and beliefs. Research from various countries shows, for example, that emigrants can influence the politics of the home country. It has also been recognized that social remittances are not a one-way phenomenon from the host to home country; instead, reverse flows may occur from the home to

the host country (Levitt & Lamba-Nieves, 2010; Boccagni & Decimo, 2013).

The concept of 'social remittances' and impacts on sending countries has attracted a great deal of attention, following publications by Levitt. Examples of such scholarship may be found in Šerbedžija and Nowicka (2016), White and Grabowska (2019), Boccagni and Decimo (2013), Lacroix et al. (2016), and Grabowska and Buler (2019). Some authors have used slightly different terminology when discussing the circulation of ideas between home and host countries. For example, Fargues (2011) uses the concept of 'ideational remittances' to describe what he considers a wider range of values and models conveyed by migrants, going beyond entrepreneurial values and practices. He analyzes the impact of ideational remittances on fertility levels in migrants' home countries. Other researchers have focused more sharply on the political dimensions of the process and argue that the concepts of social remittances and political remittances should be viewed as distinct realities (Tabar & Maalouf, 2016).

While cultural diffusion of ideas and norms can occur across time and space in different ways that may be random and unsystematic, social remittances have specific characteristics and modes of transmission that distinguish them from general cultural diffusion. As described by Levitt (1998), four such characteristics are as follows: (i) social remittances are specifiable and migrants as well as nonmigrants can state how they heard of an idea or practice, (ii) they are communicated intentionally, (iii) they are transmitted through contact between persons with social ties, and (iv) social remittances occur through a staged process in which macro-level global flows of ideas precede and facilitate the transmission of social remittances.

In many cases, migration is not spread equally across all geographical locations within a sending country. Specific areas and communities demonstrate a higher propensity to migrate than others, partially as a result of social networks that enable and promote the migration of friends and relatives in the home country. At the same time, specific geographical areas within the

host countries become home to migrants, owing to land and rental costs, government policies on locating migrants, preferences of migrants, and other factors. This historical spatial growth and settlement of migrants results in the development of home and host communities that may be paired together to study the two-way flow of social remittances. Many studies of social remittances look at such pairs in the home and host countries to understand the dynamics through which such remittances are transferred and adopted, or not.

The type of migration, in terms of being temporary or permanent, may underlie different dynamics and impacts on the host and home countries. In the case of temporary labor migrants who move to their destination country for short periods and live there in relatively isolated worker camps or areas, interaction with the host culture and society may be limited and fragmentary. In the case of permanent migrants who choose to settle in a new homeland, the migration experience may be very different, spanning several generations that continue to maintain ties with their origin country. At the same time, the settlement policies of the host country in terms of allowing a path to citizenship (or not) may have an impact on the formation of identities and belongingness, which in turn may affect the absorption of new norms that may be transmitted back to the home country. Perceptions and feelings of belonging may develop even when migrants know that their residence in the host country may be disrupted at short notice. Second-generation and third-generation migrants may begin to consider their host country 'home' and develop ideas that imagine a long-term future in that country (Shah, 2016).

As the duration of settlement in the host country is prolonged, ties with the home country are likely to weaken in later generations. Values that emphasize individualization may predominate over those related to extended family ties. In other cases, such ties may continue for longer durations. They may be reinforced through intermarriages of inhabitants in the host and home countries, as found in the case of Pakistanis settled in the UK (Bolognani, 2017). Financial remittances usually form an intrinsic and fundamental

dimension of exchanges between home and host country actors. The reasons for such remittances may fall along a wide spectrum consisting of motivations such as family support, investment, philanthropic contributions, and many others.

Each of these exchanges carries a social meaning where cultural expectations and obligations are being met (Rahman et al., 2014; Gallo, 2013; Isaakyan & Triandafyllidou, 2017; Mata-Codesal, 2013). Financial remittance receipts may be crucial for the survival of the family and may expand its ability to consume additional resources such as better-quality food, the education of its children or use of healthcare services. Remittance receipts may also be personally empowering for those left behind, enabling additional expenditure on socially valued items and events. Alternatively, disagreements over sharing such receipts may result in conflict between family members. Thus, economic remittances may be embedded within a wide range of obligations and pressures. Research on the social meaning and sociocultural impacts of financial remittances, however, remains scanty (Tuccio & Wahba, 2020).

Social remittances may be transferred at the individual, family, community or institutional level. The extent to which social remittances are transmitted from the host to home country may vary according to many factors, including the acceptability of foreign norms in the local culture, the frequency of contact, the size of the network, personal benefits derived from such remittances, the status and prestige of the person initiating such remittances, and the power relations between sending and receiving countries (Christiansen, 2012; Levitt, 1998).

Social remittances transmitted by migrants may have varying impacts on the communities and families in home and host countries. Impacts on development in the home country may be positive or negative, depending on a wide range of circumstances and factors; some members of the home country may view these remittances positively while others view them negatively (Montefrio et al., 2014). Research on such social remittances remains especially weak, unlike the research on financial remittances.

In terms of methodological strategies, research on social remittances and consequent social changes in the home (or host) country are usually based on qualitative, in-depth, and sometimes longitudinal studies. In some cases, narratives by a small number of migrants are used to understand the dynamics through which social remittances are transferred from host to home countries and received there (for example, Christiansen, 2012). Other research uses ethnographic evidence from migrants and their home localities (see Zotova & Cohen, 2016) or in-depth case studies of migrants (see Brown, 2016). However, some authors have used survey data to understand the impacts of migration on attitude and behavior changes in the home country. Some examples include studies of Poland by White (2016), Morocco by Tuccio et al. (2019) and Jordan by Tuccio and Wahba (2018).

Social remittances are likely to occur in all countries where international migrants leave their home country to reside in another country, permanently or temporarily. Like several other countries, Pakistan has a long history of migration, with a diaspora presence in a wide array of countries, estimated at a stock of about 9 million in 2021 (Shah et al., 2020, 2022). The country witnessed large-scale migration at the time of its creation in 1947. It has sent many permanent migrants to North America, Europe, Australia and New Zealand. A spike occurred in outward flows of migrants from Pakistan in the early 1970s when temporary labor migrants started going to the oil-rich Gulf countries. Annual outflows have generally shown an upward trend with some fluctuations. This phenomenon has continued till present-day, with an estimated total outflow of about 13 million labor migrants, at least half of whom have returned over the years. The two years following the Covid-19 pandemic witnessed major declines in annual outflows of migrant workers. Some research has been published on the socioeconomic impacts of overseas migration, but the varied impacts of social remittances on Pakistan and other Asian countries remain under-researched.

To augment the existing knowledge about the role of social remittances in social change, the Centre on International Migration, Remittances and Diaspora organized an international

conference in Lahore, Pakistan, in February 2023. The conference focused on Asian and Middle Eastern countries, including Pakistan, where such research is particularly deficient. Its specific objectives were to enrich existing knowledge about the types, nature and frequency of social remittance diffusion between individuals, families and communities in home and host countries in Europe, North America, the Gulf, and other parts of the world. A related goal was to gauge the major social changes and outcomes that may have resulted from the diffusion of social remittances, focusing on home as well as host countries. Based on this knowledge, we aimed to provide examples of the development impacts of social remittances to suggest policy guidelines that might aid such development in the future.

This volume is an outcome of the conference and addresses several key questions using different methodologies. The constituent chapters range from macro-level analyses of global data and social remittances between pairs of countries to the role of social media in social remittances and analyses of survey data and quantitative techniques to infer the impacts of social remittances by male migrants on women left behind. The main ideas presented in these chapters are summarized below.

Definitional and measurement murkiness

While assessing the state of scholarship in this field, Peggy Levitt, the main architect of the concept of 'social remittances' notes that, despite having been adopted by several authors, a rigorous attempt to synthesize this knowledge is still absent. Thus, many scholars feel that, even though the concept is intriguing, it remains 'too amorphous and undefined. In Chapter 2, she asks, 'How do you tell a social remittance when you see it?' She highlights the difficulty in interpreting the concept faced by scholars from different backgrounds. Anthropologists and sociologists generally use qualitative studies where they observe and interpret the changes that migration from one community brings about in another by transmitting social remittances. The more quantitatively inclined scholars tend to analyze surveys and use various statistical techniques to understand these relationships.

Following from her earlier work, Levitt outlines five main aspects that are central to social remittances transmission. First, social remittances circulate within transnational social fields that are multi-scalar and multi-sited. Second, both migrants and nonmigrants are affected by social remittances. Third, the impact of social remittances can 'scale up', that is, through the increased capacity of home and host country participants to benefit from the relationship. Their impact can also 'scale out' when something found useful in one setting is applied to another. Fourth, the impact of social remittances is affected by the relative position of the senders and receivers. Finally, the nature of social remittances may differ according to the type of remitter, varying from passive observers of host country values to those who engage actively with host country ideas and transmit them back to the home country.

While recognizing the limitations that hinder the expansion of this field, Levitt highlights the need to develop a methodology that would accommodate the interests and abilities of scholars from different backgrounds. She envisions a methodology that combines qualitative and quantitative methods—in-depth case studies and large surveys designed to collect data on changes in specific values and practices that may have resulted from the transmission of social remittances. She advises that young scholars who can carry out this work must be part of the conversation above.

Social remittances as an agent of fertility decline

Using a demographer's lens, Philippe Fargues has revisited and further developed his hypothesis on the relationship between international migration and fertility changes, mediated by possible social remittances. In previous research using time correlations, he has found that, when migrants move from lower-fertility to higher-fertility countries, this tends to result in higher fertility in the home country; the impact of migration from high-fertility to low-fertility areas is the opposite (Fargues, 2006, 2011). In Chapter 3, Fargues extends this analysis using space correlations at the global level, including 159 countries with a population of 1 million or more for which international migration data is provided by the UN. He also

looks at several variables measuring the general development level of countries from which emigrants have originated and their countries of destination. He reports that 'the level of fertility of a country is not related to any variable as much as to the average fertility of the destination countries of its emigrants and girls' enrolment at school in these countries.' These findings lead him to conclude that international migration and fertility decline are inseparable parts of the same process of social change and human development. International migration thus serves as one of the elements of fertility decline that is necessary for preventing a catastrophic future for the world.

Migrants learn from, and remit to, other migrants

The transmission of social remittances from migrants back to their home country is only one dimension of the overall process. Anne White, based on her studies of Polish and Ukrainian migrants, contends that there are mutual flows of ideas, practices and opinions between fellow migrants who may or may not be co-nationals. A focus on the interactions between migrants is important because many of them may associate more closely with each other than with members of the host society in general. Previous migrants may in fact teach potential migrants how to 'do' migration (Chapter 4). White reminds us that, even though a minority of migrants are able to transfer and diffuse their ideas within the sending society, migrants who return to their country without being able to diffuse new ideas also bring about social change by their very presence. They do so by adding to the pool of persons who have gathered different experiences and ideas from their host country.

Case studies of social remittances by Mexicans, Filipinos, Iranians and Egyptians

Mexico-to-US migrants

While describing the broad context of migration from Mexico to the US, Philip Martin and Manolo Abella note that it is difficult to disentangle the effects of social remittances on many changes

that have occurred in rural Mexico from which many of the migrants originated (Chapter 5). One visible example of such impacts is demonstrated in the American-style homes built by migrants to portray their success and upward mobility. Another example is provided by a program to improve roads and sewerage infrastructure, whereby money raised by migrants to the US would be supplemented by the government at a ratio of 1 to 3. Preferences for village improvement, however, differ between the migrants who want to improve churches and public squares and nonmigrants who want to improve roads and sewerage facilities. The exposure of Mexican migrants to certain social security benefits offered by US employers raises their information level and consciousness about migrant rights. Ex-migrants are found to be at the forefront of protests against employers who are deficient in providing rights such as social security.

Filipinos to numerous destinations

Within the larger context of Filipino migration to many countries of the world, Martin and Abella also highlight the possible social remittances by these migrants. About 2.1 million Filipinos are employed overseas in over 100 countries. The authors report in Chapter 5 that the 'social remittances associated with Filipino migration are significant but hard to measure'. Migrants may remit a variety of ideas, including their views on democracy or good governance, consumption and lifestyle preferences, religious values, educational aspirations, and views on marriage and family. However, it is difficult to ascertain how such remittances occur and a systematic study of this remains to be done. The large diversity of the destinations where Filipino migrants reside adds to the difficulty of such measurement.

Given that more than half of all Filipino migrants are women, significant impacts on behavioral aspects of the family left behind may be expected. These could include attitudes toward age at marriage, fertility and women's employment. However, the role of social remittances in bringing about such changes may not be clear.

Southern Iranians to Dubai

Based on qualitative interviews and observation of migrants from southern Iran to the UAE, especially Dubai, Amin Moghadam (Chapter 6) presents a rich analysis of the social remittances by these migrants, some of whom have now attained Emirati nationality. Relationships between migrants and their home communities are 'developed through complex socio-historical and conjunctural relationships, they evolve over time and can be appropriated, instrumentalized or modified by a variety of social and political actors, ranging from individuals to the state, via migrant associations or other forms of transnational organizations.'

Charitable projects and financial transfers by Iranian migrants have helped bring about major changes in cities such as Evaz in Larestan. The city has benefited not only from major infrastructural improvements but has also been able to establish higher education institutions, enabling it to develop. Migrants in this corridor to the Gulf are predominated by the minority Sunni community who have established fruitful personal and cultural ties with their host communities and in turn benefitted their home communities. By investing in their home communities, migrants gain prestige not only in the home country but also in the migrant community in the host country.

Moghadam also discusses the role played by certain cultural figures such as actors and poets who have contributed to maintaining social ties and knowledge of the home country language and culture between Larestanis in Dubai and their home community. Such efforts have been aided by the use of theatre performances with comical themes. An Iranian poet who has been living in Dubai for 30 years has successfully raised funds for charitable work in her home community in Larestan through her poetic and patriotic work.

Egyptians to the Gulf countries

With an estimated 9 million Egyptian migrants overseas, Ayman Zohry reports that about 70 percent of such migration is to the Arab Gulf countries. Financial remittances from migrants

amount to about USD 30 billion per year and are a major source of foreign exchange earnings. Gulf migration has had many different social and cultural impacts on Egypt. New and different types of consumption patterns reflect one such form of social remittances. Migration to Saudi Arabia with its Wahhabism philosophy has affected Egyptian society in other ways by 'reproducing a new version of social and religious behavior with an increased tendency towards fundamentalism and marginalization of women' (Chapter 7). The ideas of Wahhabi theologians have been imparted by a new cadre of religious leaders. Everyday practices such as recitation of the Quran also reflect the Saudi style.

Other notable impacts on Egyptian society include changes in dress among men as well as women. While the colors and fabric of male dress have adapted to reflect Gulf culture, women's attire has become more traditional and a much larger percentage now cover their heads or faces or wear a hijab, unlike a few decades ago. The realms of art, literature and cuisine also reflect exposure to the Gulf through migration.

Social remittances through social media: The example of Sri Lanka

In Chapter 8, Bilesha Weeraratne looks at the impact of social remittances through popular social media (such as WhatsApp and Facebook) on perceptions of the ongoing Sri Lankan social, economic and political crisis. An online survey of 157 respondents was conducted from August to December 2022, targeting Sri Lankans either currently living in Sri Lanka or abroad who maintained regular contact with their friends and relatives overseas or in Sri Lanka. The survey included questions on the frequency of interaction and exchange of views about the crisis. It also asked whether communication through social media affected the stress levels of those in Sri Lanka and overseas. The study finds that about 61 percent of all respondents reported an increase in stress levels resulting from such exchanges; only 15 percent experienced relief from stress. Communication through social

media enabled a majority of respondents to better understand the crisis and its general implications for the country.

The survey confirmed that social remittances were bi-directional, although the percentage of those who read the material they received was considerably larger than those who posted content. This would imply that those outside Sri Lanka were more strongly influenced by social remittances from the country, in turn possibly affecting behaviors such as financial remittances. Weeraratne suggests that social remittances can potentially affect migration decisions and can thus be leveraged to improve the return and reintegration experience of migrants in the future.

The last two chapters use survey data to analyze the impacts of male migration on the empowerment of women left behind. The analyses by Rostom et al. for Egypt and by Shah and Quddus for Pakistan use quantitative techniques and make indirect inferences about the transmission of ideas and values relating to women's work and decision making.

Male migration and empowerment of women left behind in Egypt

Using data from three waves of the Egyptian Labor Market Panel Survey, Rostom et al. (Chapter 9) explore the impact of male migration on the labor force participation and empowerment of women left behind, in terms of freedom of mobility, financial independence and household decision-making. They find that the migration of a male household member is associated with a higher level of empowerment for the women left behind in urban areas. Women living in rural as well as urban areas are also less likely to ask their husband or another family member for permission when going out and more likely to have personal savings than women living in a nonmigrant household. In terms of women's participation in the labor force, the authors find that rural women assume the role played by the male migrant in subsistence work and unpaid family work.

The authors are not able to estimate whether male migration brings about changes in women's empowerment as a result of normative transfers from the host country. However, they suggest that policies and programs should consider the possible role of such transfers in women's work participation and various dimensions of empowerment to reduce the negative impacts of migration on left-behind women.

Male migration and women's decision making in Pakistan

In Chapter 10, Shah and Quddus analyze the impacts of male migration on women's participation in household decision-making in terms of their own health, visiting family and friends, making large household purchases and spending the husband's income. Data from the nationally representative Demographic and Health Survey (DHS) 2017/18 was used for this purpose, supplemented by qualitative research on women left behind by migrant workers. Almost 10 percent of the sampled households contained at least one migrant, typically a male working in a Gulf country. Women's decision-making autonomy was compared between migrant and nonmigrant households.

After controlling for relevant background characteristics, the regression analysis showed that women living in migrant households were significantly more likely to make independent decisions on all the matters considered compared with those in nonmigrant households. The transition to becoming the household head was an especially critical pathway to greater autonomy, with female heads being four to six times more likely to make independent decisions than nonheads. The latter resided in joint families where these decisions were made primarily by the mother-in-law or other male members of the family. These findings were supported by qualitative interviews with women who were living independently of their husband's family and could exercise their agency in decision making. The DHS data did not have any questions on the husband's norms and values regarding the wife's decision-making role in the family to assess whether such norms were different in migrant and nonmigrant

households and whether exposure to host country norms had any impact on them.

Conclusion

In an effort to contribute to our understanding of how social remittances by migrants can affect their home countries, the chapters in this book cover a wide range of geographical settings and address varying questions using different methodologies. The authors provide examples that outline the linkages between pairs of host and home countries and the impacts of social remittances on the former. These pairs include Mexico-the US, the Philippines-Gulf, southern Iran-Dubai, and Gulf-Egypt. Others use quantitative analyses of the impacts of male migration on the empowerment and autonomy of women left behind to infer how migration tends to affect social change in family relationships in Egypt and Pakistan. In a macro-level analysis, the global association between migration and fertility levels is explored to conclude that migration and fertility decline are both aspects of the same forces of social change and human development. The role that social media can play in the transfer of social remittances is demonstrated in the case of Sri Lanka. Finally, the role that other migrants play in transmitting social remittances to co-migrants or potential migrants is addressed for Polish and Ukrainian migrants.

A general conclusion drawn by several authors and re-affirmed by Peggy Levitt is the difficulty of measuring social remittances and the need for further specification of the contours and dimensions of this concept through the combined use of quantitative and qualitative approaches. The multiplicity of approaches and methodologies used by the authors in this volume illustrates the diversity of our understanding of social remittances and calls for further research that would move the field toward greater coherence.

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Chapter 2

Social remittances: Reflections, redefinitions and a wish-list for moving forward

Peggy Levitt

Introduction

During our wonderful visit to Lahore for which I wrote this conference keynote address, we had the opportunity to visit the Lahore Museum, Pakistan's oldest and largest. I wanted to go because I am a student of museums. I love to see what objects museums put on display but also how they display them. What kind of histories do curators tell with their collections?

What I saw in Lahore stopped me in my tracks. If I had visited a similar museum in Europe or the US, the story of the world's civilizations on display would have undoubtedly begun in Egypt, Greece and Rome before proceeding directly to Europe—the undisputed pinnacle of development. Instead, I was greeted by 'Stone Age tools from the Soan Valley, the earliest objects produced by human beings' (Pre-historic and Indus Gallery, n.d.). This part of the world, wrote historian Peter Frankopan (2015), was a 'bridge between east and west where great metropolises were established nearly 5,000 years ago' (p. 7). Harappa and Mohenjo-daro 'were the wonders of the ancient world' with tens of thousands of residents and 'streets connecting into a sophisticated sewage system that would not be rivalled in Europe for thousands of years' (Frankopan, 2015, p. 7). On display were measuring weights, toys and games, pottery, terracotta jewelry

and semi-precious beads, all produced by an important and innovative civilization (Pre-historic and Indus Gallery, n.d.).

Two things struck me about this experience. The first is just how much the history we tell depends on where we live. I'm willing to wager I'm not the only one raised in the US who never learned about the great ancient civilizations of the Indus Valley that give Greece and Rome a run for their money. The second is the strong relationship between the migration of people with the migration of their culture. One of the reasons these cities and peoples advanced so far, Frankopan argues, was that 'as they traded and exchanged ideas, they learnt and borrowed from each other, stimulating further advances in philosophy, the sciences, language, and religion' (2015, p. 9). In other words, they moved and their culture moved with them.

I'm sure archeologists of pre-history have their own ways of studying cultural diffusion. When social scientists take up the topic, they often overlook the fact that circulation itself is a cultural act. By that I mean, building on Jijon (2019), that 'culture is not only the object being spread around the world or the local context being transformed by (or resisting) the foreign object' (p. 144). Culture is also the backdrop of values, beliefs and practices that shape how culture travels. If the study of the 'globalization of culture' is the study of how cultural objects move, 'cultural globalization' is the study of how culture itself shapes this movement. For ideas and cultural objects to travel, they need to be interpreted literally, figuratively, affectively, aesthetically, and materially (Levitt & Siliunas, 2023).

What does this all have to do with social remittances? A great deal. Traders along the Silk Road observed new ideas and practices and acquired new skills as they traveled. Sometimes they shared these with their family and community members when they got home. Sometimes, the values and traditions in place aided their efforts to adapt what they learned to their local context. At others, they impeded circulation and change.

Similar kinds of cultural circulations and adaptation happen all the time today. In my work, I've called these 'social

remittances'. Sometimes, social remittance circulation is strongly linked to actual migration between a particular sending and receiving site. Sometimes, these exchanges are driven by people who also introduce new ideas and practices without directing them at a particular place but rather at a set of economic or cultural institutions. Sometimes, the impact of these exchanges is positive and often it is negative.

Since I first wrote about social remittances nearly 30 years ago, many scholars have taken up this concept. It is beyond my scope to summarize and synthesize this important, ever-growing body of scholarship. Much of this work has been written by anthropologists and sociologists who produce qualitative accounts of how social remittances change political, cultural, economic and religious life in particular places. Economists, demographers and political scientists, usually using quantitative methods, have explored the relationship between social remittances and social change outcomes such as fertility declines or changes in gender norms. Both groups think there is something going on, but they are not convinced by the evidence the other brings to bear. They want a clearer definition of what social remittances are and how we know them when we see them.

In this chapter, I take up this charge. I discuss what I have learned about migration and social remittances over these many years, trying to clarify, redefine and reflect on our analyses to date. I focus on how my own writing and thinking has evolved rather than trying to summarize developments in the field at large. I'll then suggest ways to get out of this impasse. How can we study social remittances collaboratively, with each side contributing based on its own strengths, so that the resulting findings are more robust and compelling to everyone? What do we need to learn so that, when possible, social remittances can be channeled as catalysts for positive change?

A look back

I began my research on what would become *The Transnational Villagers* (Levitt, 2001) in the early 1990s. Although I've moved on

to other questions in other parts of the world, I've kept in close touch with some of the people I met in the place I called Miraflores. I've been able to observe, from near and far, how migration affected this community over at least two, if not three, generations. Along the way, I've learned a lot about the costs and benefits, the wins and losses, that come when a community becomes almost totally dependent on migration for its survival.

Let me start with my Dominican family whom I see as a microcosm of the windfalls and havoc that migration wields. What happened in this one family is a mirror onto what happens in many families and to many communities at large. I have five Dominican siblings. Two sisters live in the US, one brother goes back and forth between Rhode Island and Santo Domingo, and one brother was deported after spending time in jail. The elder sister, who tried to migrate but gave up after two failed attempts, stayed home and cared for her mother. She now lives in the home that has been completely renovated thanks to the money her siblings earned while working in the US.

When I first traveled to Miraflores, there were no sidewalks or paved roads. The electricity and water went out frequently. We used the outhouse to bath. Every morning, the older men who still lived in the village went off to work in the fields (mostly as hired hands because few owned their own land). The women cleaned, washed and cooked. There was an easy back-and-forth between neighbors as they did their daily chores. If one day, someone cooked something special, she sent some over to her neighbor. The next day, her neighbor would send something back to her. Every day, once the sun got too hot, we went inside to eat and watch the afternoon soap operas. Women and children without televisions knew what time to drop by. If they hadn't eaten, there was always food to share.

In the afternoon, after we had bathed and rested, another round of visiting and coffee drinking began. We would sit on the front veranda, in the rocking chairs that Dominicans favor, and wait for people to drop by. No need for an invitation. Sometimes

we went visiting too. The day ended with supper and more soap operas. Comfortingly predictable, connected, communal.

I haven't been back to Miraflores for many years, but I've kept abreast of the changes that have occurred and the debates about them. All the streets are paved and there are sidewalks. There are many more cars. Some families have enough money to build new homes with air conditioning and appliances. There is indoor plumbing and no one has to worry about the lights going out or the water going off. But that easy sociability is gone. For one thing, the income divide between neighbors has grown exponentially. There is a stark divide between the haves and have-nots. The have-nots cannot keep up and they feel resentful and left behind as a result. More money means more crime and gangs. My family does not sit outside in the front anymore and greet everyone who strolls by. Instead, they sit in the back garden behind a gate and lock the door tightly at night. Life is easier because there are more conveniences, but it is impoverished because that deep, daily intimacy between neighbors has faded away.

That tension between what one gains and gives up with migration is evident within my family. The eldest sister, Teresa, who stayed home to care for her mother and the son her sister left behind, now has most of her material needs met. But she is dependent on her siblings and, to be frank, on me for all of it. While many of her nieces and nephews who grew up in the US went on to college and are self-sufficient, her son, who just finished high school, struggles to find full-time work that lasts. Desperate to support his family, he has fallen prey to get-rich-schemes, gambling and loan sharks who act exactly as their name suggests. Teresa's brothers and sisters are tired of bailing him out each time he gets in too deep.

At the same time, her sister Carmen, who lives in Boston, is a poster child for immigrant success. She married a university-educated Dominican entrepreneur who ran a children's clothing store in the heart of Boston's Latinx community for many years. He sold the store when he was hired as the mayor's liaison to immigrant communities. He and Carmen bought properties—

their own home and a rental property next door. They are now in the market for a retirement condo in Tampa, Florida. When Carmen visits Miraflores each year, she is the patron rather than the beneficiary of largesse, keenly aware of her role but always juggling how much to give whom. Teresa and Carmen are locked in relations of dependence, disappointment and love. Teresa hates asking and resents that her son did not have the same opportunities as his cousins. Carmen resents the constant asking. Both feel misunderstood by the other.

In between are Luis and his wife, who worked long enough in Rhode Island to buy and fix up a home in Bani, the closest big town. They go back and forth between the island and the US because some of their children still live in the northeastern US. There is also Carlos who was deported after serving time in jail on a petty drug charge. While in prison, he learned to cut hair and that is how he earns whatever he can to support himself. Even success-story Carmen has her heartbreak. Her son from her first marriage, whom Theresa raised for the first six years of his life, never adjusted to life in the US when he finally joined her there. He also got arrested and was subsequently deported, leaving three children he cannot visit in the US. The reason Carmen continues to work is to support him and his family as there are so few economic opportunities for him in Miraflores.

The shifting fortunes of this family and the starkly unequal distribution of migration's rewards, mimic the shifting fortunes of the town. At last count, nearly 70 percent of the households in Miraflores had family members in the US, but the economic problems that forced people to migrate to begin with go unresolved. Agriculture is mechanized and no young people want to do that kind of work anymore anyway. The government did not have to address the problem of mass unemployment—it just exported its workers. In many ways, the community is healthier, more educated, and better cared for than ever before, but competition, mistrust and fear have weakened the social fabric. Another thing that is for sure—Miraflores cannot cure itself of its migration habit. There is no way to survive without it.

I first wrote about social remittances because, at the time I began my research, everyone was talking about economic remittances but not about the ideas, values, identities, practices and social capital that circulated between sending and receiving communities. The circulation of social remittances affected Miraflores in trivial and profound ways. I noted, for example, that when I visited during the winter—and the temperature was 80 degrees rather than the 100-plus degrees it rose to in the summer—many of the young women were wearing long-sleeved sweaters and knee-high boots. Why were they dressed this way when, for me, the weather was so warm? It was because they had seen their migrant mothers and sisters make such fashion choices when they returned to visit. They too wanted to dress in the latest styles from Boston, even when their wardrobe made little climactic sense.

In changes more fundamental, these same young women did not want to marry a man who had not migrated. They wanted a man who helped around the house and participated in raising his children, which is what men who migrated seemed to do (although I should note that this was mostly by necessity than by choice). They had to step up because, in the US, their wives were working too. Men who had not migrated felt doubly emasculated by the too-few opportunities for work in the village and by this blanket rejection from potential marriage partners.

Ideas about politics and community engagement also changed profoundly. When people watched former US President Bill Clinton held accountable for his role in the Whitewater Scandal, they wanted Dominican politicians held accountable too. When the Community Development Committee, which raised money to support the health clinic, school and various other construction projects, demanded that expenditures be shared publicly, community members called for budgetary transparency in all projects. In short, there was a lot more than just money circulating between Miraflores and Boston and it transformed social, political and religious life in big and small ways.

In my first writing about social remittances, I focused much more on circulation back to the Dominican Republic. I did not pay

enough attention to what migrants brought with them to Boston and how these things transformed community life there. I unintentionally gave the impression that circulation was one-way and that all that was good came from the US. I also overlooked collective social remittances or the ways that ideas, practices and values circulated within the context of community agendas—be they road or building projects or political parties.

A reconsideration

When I published 'Social Remittances Revisited' with my colleague, Deepak Lamba-Nieves in 2011, we tried to address some of these shortcomings. We wrote that social remittances *are exchanges of ideas and practices between individuals in the context of one-on-one exchanges and in their roles as actors in organizations*. But they always take place against the cultural backdrop of the moment, that 'horizon of affect and meaning' that Jijon (2019, p. 144) refers to. This is even more so now than before as in the years that I have been connected to Miraflores, technology has fundamentally transformed people's ability to be in touch with one another. Whereas in 1990, a once-a-month phone call was a big deal, now family members are in touch daily by phone, WhatsApp, Facetime, etc. Their ability to be part of each other's lives virtually, if not physically, has grown exponentially. Now few places would be immune to models of changing gender roles that were new in Miraflores at the time. All Mirafloreños, no matter what their age, see these ways of being in films, on the internet or on social media.

That brings worlds together, but that does not mean that they do so at the same rate and rhythm. What I have learned by continuing to observe Miraflores and by studying other migrant communities in Boston from Brazil, Ireland, Pakistan and India is that, over time, there is a growing disjuncture between what the homeland is and how migrants remember it and need it to be. In other words, migrants often cling to the notion that their homelands stay the same. They need to imagine that there is a place where traditional values and customs are maintained, which stands in sharp contrast to the inferior values they see at work in the US. It is the consolation prize they get for the sacrifices

they make as migrants. It is also the salve to the wound of having to live among people whose values are so different and, in some cases, in their opinion, morally bankrupt.

For example, when I studied second generation Indian-Americans whose families were originally from Gujarat, there were always conflicts between parents and children. Many of these young people lived a double life—that in school and that on the weekend among family and fellow Hindu temple members. It was abundantly clear which one mattered most. They could not date, sleep over at other children's houses and, when they got old enough, they were strictly forbidden to drink. They were being brought up according to traditional Indian *sanskar* [culture]. When they visited India, their parents wanted their relatives to see that it was possible to raise a child well in a foreign land. At the same time, things in India were changing. While they returned to India wearing modest clothing, their cousins were wearing short skirts and bikinis. They could go out on their own. There was a disjuncture between what their parents needed India to be and what it was becoming, and a struggle over what values needed to stay in place and which should be left by the wayside. I called this the *ossification effect*—the homeland was frozen in time in migrants' minds but, in real life, was changing rapidly.

This has a collective variant that has important policy consequences that I learned about in a study I did with colleagues Jennifer Holdaway, P. Fang and N. Rajaram on the role of Indian and Chinese medical professionals who had studied abroad and were now working in their home countries. Many of these individuals had been sent to postgraduate public health programs in the US and the UK. Rather than learning about primary healthcare delivery and basic disease prevention, their courses had covered diseases found in advanced industrial settings—addiction, alcoholism, hypertension. There was a mismatch between what they learned and what they needed for their work back home, but the program had not even thought of sending students to study in places with similar health infrastructures and challenges, such as Indonesia or Thailand (Holdaway et al., 2015). They returned with a set of knowledge and tools that were not well-suited to deal with

health challenges on the ground. Again, what the migrant learns from or takes away from their host country is not always a good fit with what is happening in their homeland. These disjunctures occur because there is a mismatch between what the homeland once was and what it has become or because ideas and practices from one are incompatible with the other.

This out-of-syncness grew worse depending on the age at which the migrant went abroad. People who had studied in India and China before leaving the country had time to create the social networks and accrue some of the social capital necessary to implement their new ideas and practices when they came back. When they returned and were hired at a hospital where former classmates were also on staff, these relationships enabled them to successfully implement the reforms they sought to put in place. Had they gone abroad before solidifying these social ties, they would have been hard-pressed to see their vision realized. Not only did they not have friends in high places, but they did not understand the social rules about deference and patronage they needed to know to get things done. In some settings, they encountered resistance from people who had stayed home and saw themselves as 'fighting-the-good-fight'. Why should these folks be welcomed back as heroes when nonmigrants were really the heroes who had been slogging away all along? One example of this was when Pakistani universities tried to recruit emigrant Pakistani professors to return home by offering them salaries that were significantly higher than those paid to their nonmigrant peers. Is it any wonder that nonmigrants felt resentful?

Related scholarship

Many scholars have taken up the idea of social remittances, applying it to political, economic, cultural and religious life. I will only mention a few of these efforts here, with which I had the privilege of being peripherally involved. Izabella Grabowska, Anne White and their team looked at social remittance impacts on human capital and work skills, with a focus on Eastern Europe (White & Grabowska, 2019; Grabowska & Buler, 2019). Their work makes a unique contribution in its historical scope. In fact,

Grabowska reinterpreted Thomas and Znaniecki's classic, *The Polish Peasant in Europe and America*, as an early example of social remittance circulation.

In their book, *Migration and Remittances in Global Europe*, Magdalena Nowicka and Vojin Šerbedžija (2017) proposed an analytical framework for researching social remittances in the context of global migration. The literature had until then, in their view, focused too much on social transformation, migrant transnationalism and cultural diffusion. It needed to be brought into conversation with theories about the meaning of connectivity, which emerges when people migrate internationally. They proposed an interactive model that they connected to the idea of glocalization and conceptualized remittances as material and nonmaterial objects that change as they circulate and transform both contexts of origin and reception.

In 2016, Paolo Boccagni, Jean-Michel Lafleur and I published 'Transnational Politics as Cultural Circulation: Toward a Conceptual Understanding of Migrant Political Participation on the Move', which applied our emerging framework and concepts to transnational politics. Politics, as a result of migration-induced transnational practices, also takes shape increasingly in transnational spaces permeated by ideas, people, technology, political forms, and strategies circulating within its and between their multiple scales. Trends in global governance, national policy reforms, and individual and collective political remittances of all kinds inform and transform each other within these spaces.

The diffusion of external voting, while primarily a state-led process that occurs in (not necessarily sequential or complete) stages, is influenced by social remittances. The circulation of political remittances is often a highly variable and intermittent process—one that is shaped by the structure of opportunities and strategic interests of sending countries (and even, to some extent, of the receiving ones). The implementation of external voting laws, on the other hand, raises questions about the influence of political remittances on long-term sending states' engagement with citizens abroad.

Indeed, though limited emigrant participation in home country elections is usually the norm, that result can be interpreted in different ways. If emigrants are perceived to be disinterested, external voting can serve as a justification for sending states to disengage or focus exclusively on strategic policies (for example, those that encourage greater economic remittances). If, on the other hand, bureaucratic hurdles or lack of campaigns by political parties are blamed for limited emigrant turnout, elections held abroad can trigger further policy reforms, administrative reshuffling and party reforms. We argued therefore that the impact of political remittances, in the form of external votes, extends way beyond their impact on electoral outcomes.

A 2016 conference 'Following the Flows' at Princeton University followed soon after. The papers presented there also took up social remittances and their impact on such things as the social aspects of financial remittances, health and healthcare, female genital mutilation and external voting. A special volume of *Comparative Migration Studies* that I edited with Thomas Lacroix and Ilka Vari-Lavoisier (2016) summed up the conference proceedings by pointing out that our contributors had advanced scholarly debates in several ways:

1. By piloting innovative, interdisciplinary methods that reveal the role of networks in cultural circulation.
2. By bringing to light the legal and socioeconomic factors affecting who transfers what.
3. By beginning to untangle the complicated relationship between social remittance transfers and broader inequalities.
4. By elucidating processes of vernacularization and what contributes to scaling up and out.
5. By calling into question some of the epistemological assumptions underlying migration studies and the social sciences in general.

Our contributors, we argued, paved the way toward a next generation of migration scholarship that would bring together

discussions of migrating people and migrating material and symbolic goods. By doing so, they pointed the way to a more holistic, integrated understanding of migration systems that took objects and subjects; structures and agents; and goods, ideas and behaviors as intimately related and co-produced within the transnational social fields in which they were embedded (Lacroix et al., 2016, p. 5).

Where are we now? Restating and clarifying

The idea of social remittances has been taken up widely in the literature, although much more in some regions than in others. Most of this work is based on case studies. I can think of very few attempts to synthesize this work to see what it adds up to. Because my own work has turned to other questions, I am also guilty as charged. This means that there is a sense out there that this is an interesting idea, an intriguing concept, but that it is too amorphous and undefined. How do you tell a social remittance when you see it? How do you measure it so that you can make causal statements about the impact of social remittances on aspects of development and social change?

Let me revisit my original formulation, which in retrospect I think was very clear. I wrote that there were three types of social remittances: normative structures, systems of practice and social capital. Under normative structures, I included ideas, values and beliefs on topics such as 'family responsibility, principles of neighborliness and community participation, and aspirations for social mobility' (Levitt, 2001, p. 58). It also covered the practices and behaviors that community-based organizations such as the church and politicians should abide by. Systems of practice are the actions, behaviors and strategies that grow out of these normative structures. They cover such things as the religious rituals people engage in, how people regulate and divide up household tasks and how political parties should mobilize their supporters. By social capital, I meant the ways in which I saw migrants who rose in prominence in the host country being able to use their heightened status and power to influence things back home. They used their social networks and reputation to exert

influence themselves and to enable their nonmigrant families to do so. Mirafloreños in Boston, who worked actively to raise money and run improvement projects back home, knew this was 'goodwill that they generated and favors they stored up' that they could later cash in on.

The spaces and scales of social remittances

Social remittances circulate within transnational social fields that are multi-scaler and multi-sited. By this, I mean that the field is not just constituted by connections between a particular sending and receiving community. These ties are influenced by and affect ties between other scales of the field, such as the subnational (state/province), national and supranational (regional or international institutions). For example, in the case of Miraflores, there were personal connections between priests in Miraflores and Jamaica Plain, the Boston neighborhood where most Mirafloreños originally settled, but these connections took shape in the context of connections at other scales of the social field. Sometimes, priests working in the northeastern US region partnered with priests working in Peravia, the province where Miraflores is located. At other times, there were connections between the US and Dominican national Catholic churches.

Social remittances also circulated between actors located in different scales of the political field such as exchanges between local, state and provincial, and national political party organizations. Dominican migrants throughout the East Coast of the US brought their political commitments with them and organized local party chapters that were particularly active during election campaigns. No candidate for mayor of Santo Domingo or president of the country could get elected without campaigning in Miami, New York City or Boston. As some members of the community began to be active in Democratic politics in the US, they brought their imported organizing strategies to their efforts, which slowly began to transform local Latinx organizing efforts there. In turn, new approaches to campaigning also found their way back to the Dominican

Republic. Circulation at one scale reverberated and influenced circulation at the others.

Migrants and nonmigrants are affected

This means that migration is as much about migrants as it is about nonmigrants. Movement is not a prerequisite for being influenced by the social remittances circulating within the various scales of the transnational social field in which both are embedded. Even people who never move can be influenced by ideas, values and practices from receiving countries. And people who never leave a host country can be influenced by social remittances imported from afar. Remember my example of the young women wearing boots in the winter. Most of them had never migrated but they lived in a social space now permeated by ideas, behaviors and values very much influenced by those in Boston. Immigrant community incorporation and sending country development are therefore two sides of the same coin. We cannot talk about making things better in one without taking into consideration conditions in the other.

The impact of social remittances can scale up and scale out

The impact of remittance circulation often scales up and scales out. Let's take the example of hometown associations—community groups involving migrant and nonmigrant members who raise money to support community improvement projects such as schools, roads or computer training for young people. Miraflores has a long tradition of supporting such projects because the state repeatedly fails to provide even basic services. Migrants in Boston went through cycles of high mobilization around a particular project, disbanding and then coming together again when another community need arose. They were positioned to raise more money to support such projects than people back home and it assuaged their feelings of homesickness and dislocation. Their organizing strategies mirrored those used in Miraflores: organizing fundraising events that sometimes took place simultaneously in Boston and on the island, collecting

weekly quotas from community members, holding meetings to set priorities, etc.

As they went about their tasks, their strategies for organizing and implementing combined with new management and administrative strategies they had observed in the US. In the past, people told me, things would go well until someone was inevitably accused of mismanaging the money. Now, migrant and nonmigrant community members decided that the project expenditures would be made public so that everyone could see that all was in order. Accountability and transparency in budgeting would become a standard part of community practice.

Scaling out occurs when something learned in one setting is applied to another. For example, community members came to expect transparency and accountability in any project taken up by the development committee and in any project taken up by the community at large. Soon, members of the parent-teacher association at the school or fundraisers for political parties were also asked to publicly account for how their monies were being spent (Levitt & Lamba-Nieves, 2011).

The impact of social remittances depends on how senders and receivers are positioned in relation to each other

What is special about the Miraflores case that makes the intensity and impact of social remittance circulation so strong and widespread? The fact that a critical mass of people from one place remain connected to a critical mass of people from their homeland and that they were geographically concentrated in space. At least initially, migrants settled near one another often found jobs at the same factories or would run into each other when they did errands in their neighborhood. People used to like to say that people in Miraflores found out faster about news in Boston than some of the migrants living there.

While this is a particular kind of configuration between village and urban neighborhood, at least in the early phases of a migration history, we see similar kinds of connections between communities in Mexico and particular neighborhoods in Chicago

and Los Angeles. I also found similar kinds of connections between rural villages in the Baroda district of Gujarat in India and particular apartment complexes and housing developments in and around the city of Lowell, Massachusetts, where these families had settled.

I discovered another kind of more diffuse circulation when I studied Brazilians from Governador Valadares who had settled in Framingham, Massachusetts. In this case, people moved from a much larger place (a city of about 350,000) to a city of about 70,000 located about 12 miles west of Boston. It was not only geographically but also culturally farther away. People also lived farther apart from one another They tended to work as cleaners for other Brazilians but not necessarily those from Valadares. So, social remittances, beyond those between family members and close friends, were more likely to arise in the context of exchanges between individuals belonging to organizations—in Catholic or Pentecostal churches that had many migrant and nonmigrant members.

Sometimes, priests would coordinate so that parishioners were singing the same hymns or reading the same readings whether they were in the US or Brazil. Some churches even recorded their services so that migrants and nonmigrants could participate jointly by watching the same worship service, although at different times. When several mainline US Protestant churches, where the numbers of congregants were declining fast, opened their doors to Brazilian Pentecostal churches looking for a place to gather and worship, the new neighbors learned a lot from one another. US congregants were inspired by the joy and fervor Brazil congregants brought to their worship. The Brazilians were, they said, 'closer to God' while they had lost their way by becoming too formal and intellectual. In the course of these interactions, Brazilians learned how to create a congregation in the US and to navigate their way through the bureaucratic and administrative requirements they needed to complete to do so (Levitt, 2007).

Another factor affecting social remittance circulation is migrants' level of contact with and integration into the host society. In the case of Miraflores, community members often lived and worked closely with one another. They could function reasonably well without speaking English. Some had little contact with the host society. The person who spoke some English or found work outside community networks had much more contact with—and could therefore influence and be more influenced by—the host society. They were bridgebuilders and gatekeepers. The social remittances they bring with them are more likely to reach nonmigrants just as they are more likely to be exposed to new things because of their broader social ties.

Types of social remitters

In *The Transnational Villagers*, I wrote about three types of social remittance generators and users: recipient observers, instrumental adapters and purposeful innovators (Levitt, 2001). Recipient observers are individuals who passively consume the world of their host country rather than go out and actively seek it out; they usually work and navigate spaces where there are other immigrants from the same country or region. Therefore, their level of contact with and exposure to the host society is lower—they do what they need to do to be able to function and get things done. They observe and absorb rather than actively seeking contact and new experiences and information.

Instrumental adapters are more proactive. They engage more dynamically but, like recipient observers, they do so with an eye toward getting the work of daily life done. The purposeful innovator, in contrast, is like a sponge, seeking out new ideas and experiences and incorporating them into their repertoire and toolkit to be better able to navigate the exigencies of daily life.

Moving forward

Let me come back to how to move forward. Over the years, I cannot count the number of times I've been asked, particularly by more quantitatively oriented scholars, how to measure the impact

of social remittances. There is a deep divide between those of us who talk to people to capture the complexities and messiness of cultural circulation. We try to understand cultural circulation by asking people something like, 'How did you do things before migration? How do you do them now, and what happened in between?' We also ask what people want to bring back with them from their host-country experience and what they do not want to adopt and instead leave behind.

More quantitively oriented folks look at places where there is high migration and an outcome they want to explain (such as declining fertility or more political participation) and see if they can identify causal mechanisms. Both sides are not convinced by what the other has to offer. Neither can communicate with stakeholders (that is, people working for migrant assistance organizations) in ways that make possible the incorporation of social remittances into their approaches.

We need each other to productively move forward. If I had the time and resources, I would convene a group of scholars, willing to stretch outside of their normal comfort zones, to think through a methodology. I could imagine it would combine both talking to people about 'before' and 'after' and surveys of larger numbers that also collect data on changes in values and practices in focused areas (politics, health and reproductive care, etc.) from particular regions. Young scholars need to be present and equal partners at this table as they are the ones who will carry this banner forward. Stakeholders should also be part of the process, so we are sure to keep their questions and concerns in mind. If we repeat this process in other regions around other areas of concern, we could generate an impressive body of comparable knowledge and a cohort of young researchers who continue to lead the way.

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Chapter 3

The 'demographic benefit of international migration' hypothesis revisited

Philippe Fargues

Introduction

This chapter starts from a double premise, which we will neither develop nor discuss here. First, it posits that the world's population is too large and poses the most serious threat to the preservation of the planet. With the current state of technology, addressing the highly desirable objective of improving humanity's wellbeing generates adverse side-effects—from diminishing stocks of nonrenewable resources to climate change, including greenhouse gas emissions and sea-level elevation, etc.—that will sooner or later make our mere existence on Earth impossible. Reducing the number of people is part of the way out of the spiral and, therefore, demographic degrowth is a suitable goal. Second, we postulate that the benefits of international migration outweigh its costs. The economic, cultural and social advantages it brings to individuals and societies—and, as importantly, to the whole world—largely exceed the price of adjustments it requires.

At the intersection of these premises, this chapter explores the following question: could it be that international migration produces a global demographic benefit? Among the many ways the migration of people between countries may affect human life on Earth, two work in opposite directions. On one hand, when people move from lower to higher levels of consumption, their own consumption and that of their communities of origin tend to

increase, with potentially deteriorating effects on the planet. On the other hand, because dominant migration is from higher to lower levels of fertility, it might precipitate the advent of an era of below-replacement fertility and population degrowth. In other words, international migration could help increase people's wellbeing while reducing their number and subsequent pressure on the planet, thereby offering a (partial) escape from the Malthusian trap.

The chapter examines to what extent levels and determinants of fertility in a country are linked to those in the destination countries of its emigrants. It furthers a previous case study of migration corridors from North Africa to the Arab Gulf states and Europe, which found a striking time correlation between fertility in migrant-origin countries and financial remittances, which the paper regarded as a proxy for the intensity of the relationship between emigrants and their home country (Fargues, 2006). Correlation was found to be negative when the fertility of the destination population was lower than that of the origin population, and positive when it was higher. This result supported a hypothesis of 'ideational remittances' by which migrants would convey to nonmigrants in origin countries ideas with an impact on family building, which they had been exposed to in destination countries. The transmission of ideas could be through a direct, one-to-one, social transnational relationship (Levitt, 1998) or through a variety of indirect communication channels, including global media. The broader conclusion was that, because international migration is more often from high- to low-birth-rate countries than the opposite, it may contribute (to a limited extent) to easing global demographic pressures.

The recent release by the United Nations Department of Economic and Social Affairs (UNDESA) (2020) of a matrix of global migrant stocks by detailed country of origin and country or region of destination makes it possible to revisit the above hypothesis in the light of space correlations at the world level. In what follows, every country of the world will be characterized by a set of variables measuring fertility levels and determinants at both ends of migration corridors: in the country itself and in a fictitious average country of destination of migrants originating

from the former (see Appendix). Potential links between origin and destination countries in terms of fertility and its determinants will be explored using bivariate correlations, and the discussion will focus on whether migration can be credited for such links.

Assembling data on migration corridors

Is fertility in a migrant-origin country linked to fertility and its determinants in the destination countries of its migrants? To address this question, one must consider that any country may send migrants to all other countries of the world. For example, according to UNDESA (2020) estimates, Pakistan's 6,328,400 migrants in 2020 were distributed by region of destination as follows: 54 percent in Northern Africa and Western Asia among whom 76 percent were men; 25 percent in Europe and Northern America (55 percent of whom were men); and 15 percent in Central and Southern Asia (50 percent of whom were men). It is very likely that the experience of a Pakistani migrant varies according to their personal status (sex, single or with a family, etc.) and the social and cultural context of the host country.

Examining how migrants' experience diversely affects their society of origin according to where they migrate, would ideally require individual data. For lack of such data, this chapter uses variables at the national level, which are available for most countries. These reflect emigration, fertility, the determinants of fertility, and the economic situation of the country. The following variables are considered:

– EMI: emigrant stock as a proportion of the total population of the origin country. EMI is computed as the total number of migrants originating from country *i* in all other countries of the world, divided by the estimated total population of country *i* in 2020. The relative size of a country's emigration (emigration intensity) is only one facet of the phenomenon. It says nothing about other important aspects, including but not limited to: why people migrate (work, refuge, study, family, etc.); how long they stay in their destination country

(temporarily, permanently, across generations); what their family status is; what skills they bring and what additional skills they acquire; how they integrate with their host society; and what links they maintain with their community of origin and with whom in that community.

- TFR: total fertility rate in 2015–20 as provided by UNDESA (2023).
- ENR: net female enrolment rate at the secondary level. Women's school education is known to be a key individual determinant of fertility. The best indicator for our purpose would have been the mean years of schooling among women of childbearing age. No international database provides such an indicator (although it would easily be computable from census data that most countries collect).
- LFP: labor force participation of the female population aged 15 years or above. Participation in economic activity has been recognized as another important individual determinant of fertility as there is competition between the presence of a woman outside the household and the number of children in the family. However, when countries are compared, the way that both phenomena are linked is not univocal. Indeed, high female participation can be associated with high fertility (as in traditional agricultural economies) as well as low fertility (as in post-industrial economies).
- GGG: global gender gap index. This measures the relative difference between women and men in terms of economic opportunities, education, health, and political empowerment. It is designed to be independent from the levels attained by a country in each of these four domains. It is constructed to be inversely proportionate to relative gaps and theoretically varies from 0 (complete exclusion of women) to 1 (perfect gender equality) (World Economic Forum, 2022).

– INC: gross national income per capita in purchasing power parity in 2020 (World Bank, 2023). This variable is used here to characterize the overall economic situation of a country.

Moreover, for each country, two sets of variables (TFR, ENR, LFP, GGG, and INC) are produced: (i) the value observed in the country itself and, on the other side, (ii) the average of the values observed in the destination countries of migrants originating from this particular country, weighted by the distribution of these migrants by country of destination (see the Appendix for the method of calculation). For brevity, this second value will be called TFR, ENR, etc. 'in destination countries' or 'at destination'. This way, both ends of any migration outflow—one origin and a combination of multiple destinations—can be compared according to each of these variables.

Finally, the data presented in this chapter is limited to countries with a population of 1 million or more (159 countries out of the 235 countries and territories considered in major international databases had 1 million inhabitants or more in 2020). In total, the analysis table contains 11 variables x 159 countries = 1,749 cells. The discussion below is simply based on correlations between pairs of variables, that is, to what degree the two variables tend to deviate from their average values in similar ways. One has to keep in mind that correlation is not causality and the selected variables are affected by collinearities.

Covariations of fertility levels at both ends of migration corridors

The links between emigration, fertility and the condition of women as reflected by variables characterizing each country in isolation (Table 1, column A) are in line with what we would expect.

Table 1: Correlation coefficient of total fertility rates in migrant-origin countries and selected variables relating to origin and destination countries

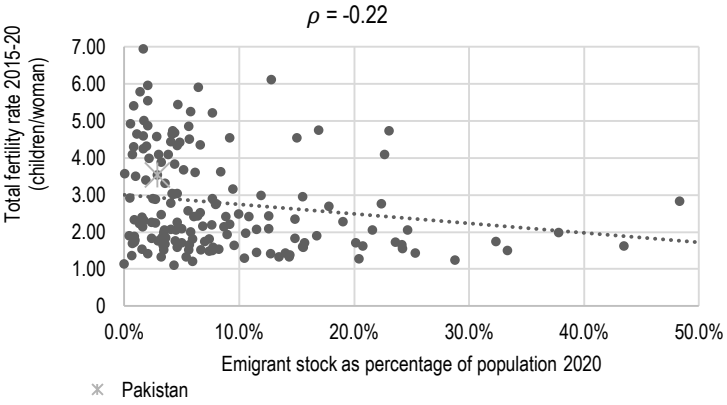
Variable	A = variable relating to origin countries	B = average variable relating to destination countries
Emigrant stock as a proportion of the total population	–0.22	
Total fertility rate		–0.81
Net enrolment rate, secondary level, females	–0.80	–0.82
Labor force participation, 15 years+, females	–0.14	–0.14
Gross national income per capita (USD PPP)	–0.62	–0.66
Global gender gap index	–0.43	–0.53

Source: Author's calculations.

Fertility is weakly although negatively (ρ = –0.22) correlated with emigration. Emigrating from one's home country and building a family—from marriage to the procreation of children and providing them with as good as possible education and care—are indeed related in many ways. For example, tens of thousands of young unmarried men leave Egypt every year for Saudi Arabia (and other destinations) to set aside enough money to return home a few years later, marry and establish a family. Reuniting with a migrant husband brings many young Maghrebi women to Europe where they will stay (a quarter of the first-residence permits delivered in the European Union to third-country nationals are for family reasons).[1] Hundreds of thousands of Filipino women leave their families to work in the Gulf states and offer their children in the Philippines better schooling opportunities, among other things.

[1] According to EUROSTAT (2023), 952,696 first-residence permits delivered in 2020 were distributed as follows: family reasons: 709,999, education reasons: 354,095, employment reasons: 1,333,571, other reasons: 555,031.

Figure 1: Emigrant stock and total fertility rate in 2015–20 (countries of 1 million or more inhabitants)



Source: Author's calculations.

The situations described above work in various directions, linking either positively or negatively the level of fertility with emigration. As a result, there is no systematic relationship between emigration rates and total fertility rates (Figure 1). High emigration is found to be associated with low fertility (for example, in Moldova) as well as high fertility (as in Burkina Faso). Conversely, low emigration goes either with low fertility (for example, in China) or high fertility (as in Nigeria). Nevertheless, a negative association (high emigration and low fertility, low emigration and high fertility) slightly prevails. While this cannot be ascribed to any causal relationship at this stage, it supports the idea of exploring a 'demographic benefit of international migration' hypothesis.

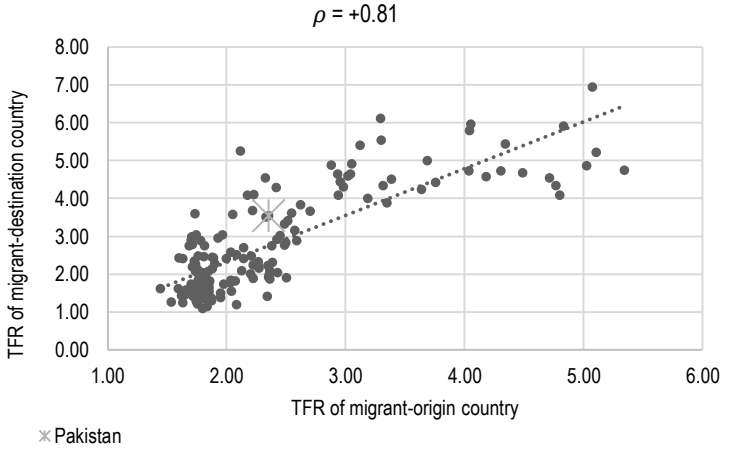
Fertility and female school enrolment rates at the secondary level have the strongest negative correlation (ρ = –0.80). International statistics gathered for this chapter simply confirm what has long been established, that girls' education is the most powerful determinant of demographic transition (see Caldwell, 1980; Kirk, 1996; Lutz et al., 2019). Indeed, providing girls with access to formal knowledge plays a multifaceted role, from making young women aspire to become more than spouses and

mothers, to opening up employment and empowerment opportunities and triggering the quantity-quality trade-off of children (Becker, 1981), which reduces desired and actual levels of fertility. In the same vein, the higher a country ranks in terms of overall gender equality in education, health and economic and political matters (that is, the higher its global gender gap index), the lower will be its total fertility rate (ρ = –0.43).

Another key correlate of fertility is the level of economic development of a country. The negative correlation between national income per capita and total fertility rate (ρ = –0.62) reflects the strong differentials that keep dividing the world—from low-income countries with an average total fertility rate still as high as 4.52 children per woman in 2015–20, to more developed countries with a far-below-replacement fertility rate of 1.67 (UNDESA, 2019). Some demographers highlight that pre-transitional stages persist in several parts of the Global South while post-transitional stages predominate in the West. They have coined the expression 'second demographic transition' to describe the situation of sustained below-replacement fertility and disconnection between marriage and procreation that prevails in the West, where net migration has become the only positive component of demographic growth (see Van De Kaa, 1987; Lesthaeghe & Surkyn, 1988). A relevant question for the purpose of this chapter is therefore whether international migration, which helps offset negative trends of natural population change at destination (in the West or elsewhere), might be linked to levels of and trends in natural population change at the origin of migration flows. It seems that this is the case.

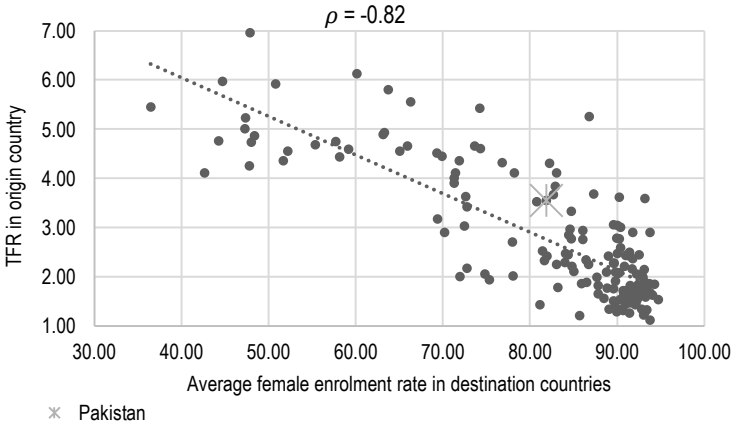
Indeed, an outstanding feature emerges from correlations when variables at destination are considered (Table 1, column B). The total fertility rate of a country is not related to any index as much as to the average total fertility rate of the destination countries of its emigrants (ρ = +0.81, see Figure 2) and to girls' average net enrolment rate at secondary level in these countries (ρ = –0.82, see Figure 3).

Figure 2: Total fertility rates in migrant destination and origin countries in 2015–20



Source: Author's calculations.

Figure 3: Female enrolment rates at secondary level in migrant-destination countries and total fertility rates in origin countries, 2015–20



Source: Author's calculations.

Other correlations between fertility in origin countries and determinants of fertility in destination countries have the same sign but a higher absolute value than the corresponding correlations between TFR and variables relating to the origin country. In other words, the level of fertility in migrant-origin countries is strongly linked to the determinants of fertility in the destination countries of its emigrants. This applies not only to girls' education but also to the global gender gap index ($\rho = -0.53$) and the rate of female labor force participation ($\rho = +0.14$), a variable with a non-univocal effect as already noted.

The markedly negative correlation between fertility in migrant-origin countries and income per capita in destination countries ($\rho = -0.66$) is another outstanding feature. This relationship is not to be interpreted in terms of fertility determinants as much as of contextual variables. It simply highlights the fact that migrants originating from more developed and at the same time low-fertility countries are destined mostly for other developed, high-income destinations. Migrants from less developed and high-fertility countries go not only to high-income countries but also to low-income countries, in particular in the case of cross-border migrant and refugee movements.

A web of international relationships

The strong correlation linking total fertility rates in migrant-origin countries and fertility and several of its factors in receiving countries is a fact. But how should this fact be interpreted? Is it that migration takes place between societies that maintain multiple relationships independently of migration and resemble each other in several ways that influence family-building choices? Or that migrants themselves (willingly or unwillingly) influence social processes among nonmigrants, notably their fertility decisions? Or that global processes of human progress include at the same time migration and fertility decline?

A first hypothesis is that origin and destination societies at both ends of a migration corridor share several features independently of migration, and these features include

determinants of fertility and other family-related aspects. This typically applies to cross-border migration. Indeed, in Western Africa, Central America, Southern Asia, Western Europe and other parts of the world, tens of millions of people work and live just the other side of the border of the country where they were born. In many cases, the border cuts into groups of population that share a culture, including ideas and behaviors that affect family-building patterns.

Other forms of proximity between peoples foster migration although they do not share a culture. For example, speaking a common language facilitated the migration of Ecuadorians to Spain 9,000 km from home in the early 2000s. A common religion helps explain why most Keralite migrants in the Arab Gulf states are Muslims, while Islam represents only a quarter of Kerala's population. Similarly, bonds created by colonization keep fostering migration movements decades after colonial rule ended.

Table 2: Weighted averages of total fertility rates and selected determinants at both ends of migration corridors

Indicator	Average value		
	At origin	At destination	Difference des. – ori.
Total fertility rate (children per woman)	2.48	2.08	–0.40
Net enrolment rate, secondary level, females	51.5	75.7	+24.1
Labor force participation, 15 years or over, females	43.3	49.6	+6.3
Global gender gap index	0.560	0.663	+0.103
Gross national income per capita in purchasing power parity (USD)	18,091	42,156	+24,065
Rule-of-law index	–0.37	0.59	+0.95

Source: Author's calculations.

Table 2 features the world average values of variables TFR, ENR, LFP, GGG, and INC calculated in two different ways: using as weighting factors the size of emigrant stocks (column 'at origin') or that of immigrant stocks (column 'at destination'). A

variable not directly related to fertility, the World Bank's (2023) rule-of-law index,[2] has been added to capture the institutional context.

Schematically, Table 2 provides two perspectives: the average situation international migrants leave behind in sending countries and the average situation they find in host countries. This allows us to make the following remarks:

- Total fertility rates are lower at destination than at origin. This confirms our hypothesis that dominant migration takes place from high- to low-birth-rate countries. The difference (–0.40 children per woman) is roughly equivalent to 25 years of fertility decline at the world level. While TFR at origin (2.48) is almost equal to the world average (2.47), TFR at destination (2.08) is just above replacement level (2.05).
- In terms of girls' school enrolment, female economic participation, and the global gender gap, destination countries fare better than origin countries.
- Income per capita is more than twice as high at destination than at origin.
- Rule of law makes the biggest difference, as migrants typically leave countries with a marked deficit for countries with an above average level of confidence in and respect for the rules of society.
- The last two facts suggest that economic opportunities and quality of governance and institutions at destination are equally critical drivers of international migration.

To sum up, countries at the origin and destination of migration corridors do not resemble each other and commonalities between home and host societies cannot fully

[2] The rule-of-law index is constructed using various representative and nonrepresentative sources to capture 'perceptions of the extent to which agents have confidence in and abide by the rules of society, and in particular the quality of contract enforcement, property rights, the police, and the courts, as well as the likelihood of crime and violence.' It is approximately centered on 0 and varies between –2 and +2.

account for the remarkably high correlation between their total fertility rates.

A complementary hypothesis is that values underlying fertility decisions—to which migrants are exposed in the host society and may gradually adopt—have an influence on communities in the origin country through the ideas that migrants transmit to nonmigrants in their homeland (ideational remittances). This would apply especially to the importance attached to girls' education and other dimensions of gender equality. Such a hypothesis could, however, be called into question by the ambivalent role played by time. Indeed, on one side, migrants' exposure to the values of the receiving society is likely to depend on their integration into this society—a long and slow process. On the other side, the links they maintain with communities in the homeland tend to diminish over time and from one migrant generation to the next. It is probable that, on one hand, the time needed to endorse the host society's values and, on the other hand, the intensity of the communication between migrants and their homeland necessary for these values to be transmitted, vary inversely with each other. With the current statistics available, ideational remittances remain a hypothesis, which lacks the empirical data needed to fully validate it.

A third (again, complementary) hypothesis is that we are facing a broader, more diffuse mechanism of overall social change, of which both international migration and low fertility are part. International migration is known to be a nonrandom phenomenon. Migrants are not representative of their population of origin (of which they constitute less than 4 percent, on average). They are selected in terms of several characteristics (sex, age, health, education, connection to the outside world through fellow citizen migrants and various other channels, etc.) and, in that sense, migrants are exceptional people (Goldin et al., 2011). Together with other forms of global exchange and communication, migratory movements are part of global human progress and the diffusion of innovative ideas and values, including gender and education values that foster reductions in fertility.

Conclusion

Does international migration foster the reduction of birth rates, which seems necessary to reconcile humanity's development goals with the preservation of the planet? The global data shows that fertility is highly correlated with girls' education and progress towards gender equality, not only (as expected) within each country, but also when both ends of migration corridors are compared. An outstanding fact emerges from the international statistics compiled in this chapter: the level of fertility of a country is not related to any variable as much as to the average fertility of the destination countries of its emigrants and girls' school enrolment in these countries.

This remarkable relationship is only partly explained by cultural or other commonalities between home and host countries, as migrants typically move along marked differentials in terms of fertility and its determinants, as well as economic and governance aspects. Nontangible, ideational remittances—by which migrants would convey to nonmigrants in their homeland ideas prevailing in host societies that are conducive to lowering fertility—might contribute in part to the explanation.

Using time-series data on fertility and financial remittances (taken as a proxy for migrants' relationship with their homeland) in selected Middle Eastern countries, Fargues (2006) has found that fertility in migrant-origin countries decreases when dominant migration is destined for low-fertility Western contexts, and stays high or even increases when it is destined for high-fertility Gulf contexts. The hypothesis that flows of migrants are accompanied by flows of ideas in the opposite direction—from migrant-destination to origin countries—was formulated. It could be that migrants themselves are conveyors of ideas or that other migration-related channels are in operation.

To explore whether such a mechanism could be generalized, the present study uses space correlations between fertility and related variables at the origin and destination of all migration corridors at the world level. Extremely high correlations give credence to the flows-of-ideas explanation. However, there are

insufficient statistics on individual transnational connections to empirically validate the direct transmission, or ideational remittances, hypothesis. Our main finding is that international migration and reductions in fertility seem to be inseparable parts of the same overall process of social change and human development. Consequently, the anti-immigration sentiments and policies that have recently been spreading across every corner of the planet work against humanity's vested interest of limiting its growth.

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Appendix: Calculation of average variables at the origin and destination of migration corridors

Is the value of variable *V* in origin country *i* linked to its values in destination countries *j* of migrants originating from *i*?

To address this question, Table 1 and Figures 1–3 use the following:

- For origin country *i*, the value of variable $V_{(i)}$ as provided by international databases.
- For average destinations *j* of migrants originating from *i*, an average value $V_{(i,.)}$ is computed as the average of $V_{(j)}$ in destination countries *j* weighted by the distribution of migrants originating from country *i* by destination countries $jM_{(i,j)}$.

$$V_{(i,.)} = \sum_j V_{(j)}.M_{(i,j)} / \sum_j M_{(i,j)}$$

Weighting factors $M_{(i,j)}$ are provided by the matrix of migrant stocks in 2020 by origin and destination. Because (i) migrant stocks are primarily estimated for each country as total numbers of inward migrants and then distributed by countries of origin accordingly (measured or imputed numbers), and (ii) smaller stocks are not provided by single country but by region of origin, the full matrix of 235 origin countries x 235 destination countries = 55,225 cells contains many blank cells. For the purpose of correlations, in this chapter and Figures 1–3, a reduced matrix of 159 origin countries with more than 1 million inhabitants x 19 regions of destination = 3,021 cells (many of them still blank: see remark below) was used. Regions of destination are those of the United Nations, namely Eastern Africa, Middle Africa, Northern Africa, Southern Africa, Western Africa, Central Asia, Eastern Asia, Southeastern Asia, Southern Asia, Western Asia, Eastern Europe, Northern Europe, Southern Europe, Western Europe, the Caribbean, Central America, South America, Northern America, and Oceania.

The average values of V at the origin and destination of migrant stocks (Table 2) are computed as follows:

At origin:

$$V_{(i)} = \sum_i V_{(i)}.M_{(i,.)} / \sum_i M_{(i,.)}$$

At destination:

$$V_{(j)} = \sum_i V_{(j)}.M_{(.,j)} / \sum_j M_{(.,j)}$$

Remark on databases

UNDESA's matrix of migrant stocks is established primarily by country of destination, where international migrants reside and, therefore, can be counted. The distribution of migrants by origin country is a byproduct obtained by redistributing migrants of the same origin by the different countries of destination where they were counted. If no data exists in destination country j on migrant stocks from origin country i, then the cell i x j is left blank.

In the case of Pakistan, for example, UNDESA's matrix provides the following:

- 3,276,580 migrants residing in Pakistan originate from eight countries (Afghanistan, India, Myanmar, Iran, Sri Lanka, Indonesia, China, and Iraq). The numbers of migrants originating from the other 227 countries of the world are not provided and the corresponding cells are left blank.
- 6,328,400 migrants originating from Pakistan reside in 99 destination countries (Saudi Arabia, India, the UK, the US, Kuwait, Oman, Qatar, etc.). The numbers of migrants originating from Pakistan but residing in the remaining 136 countries are not provided and the corresponding cells are left blank.

Blank cells are a majority in UNDESA's matrix of 235 countries of destination x 235 countries of origin. Moreover, other databases used in this chapter to measure fertility and its

determinants (total fertility rate, rule-of-law index, enrolment rate, labor force participation rate, income per capita, global gender gap index) also contain blank cells, but these do not necessarily correspond to blank cells in the migrant stocks matrix. Since the purpose of the chapter is to explore the relationship between fertility and its determinants at both ends of migration corridors *i* to *j*, both the number of migrants from *i* to *j* and the fertility-related variables in *j* must be available at the same time. Considering regions instead of countries of destination has considerably reduced the proportion of blank cells.

Chapter 4

Social remittances: The influence of fellow migrants

Anne White

Introduction

This chapter argues that the influence of fellow migrants has to be taken into account in the social remitting process, and that social remittances include ideas and beliefs about migration itself. Social remittances and migration cultures are closely intertwined, although these two cultural dimensions of migration are usually studied separately. By 'fellow migrants', I mean both co-nationals and others. While the bulk of the chapter is about co-nationals, it is important to take into account that migrants from one country often live and work alongside migrants from other countries.

By 'social remittances', I mean noneconomic acquisitions from migration, possessed by individuals and, in some situations, transferred by them to others. Elsewhere, Izabela Grabowska and I have defined these as the 'ideas, practices, attitudes, values, norms, beliefs and identities which migrants bring from one society to another, as well as the non-economic capital of various kinds—knowledge, qualifications, social skills and useful contacts—which they acquire thanks to migration' (White & Grabowska, 2019, p. 34). One subset of social remittances is constituted by ideas, practices, etc., concerning migration itself—in other words, migration or mobility culture. Social remitting in this sense involves teaching potential and actual migrants about how to 'do' migration.

From Peggy Levitt's 1998 article on social remittances onward, researchers have been intrigued by the question of how and why different migrants engage differently in social remitting. I argue that even people who at first glance seem not to have picked up ideas and practices from the receiving society, may well bring ideas about migration itself back to the sending country. Often, these are the people whose voices are less often heard—the less well-integrated migrants who are not obvious agents of change. However, as I have argued elsewhere (White et al., 2018), sometimes these are the very people who are most influenced by migration since they have fewer opportunities than more highly educated, professional people to find out about foreign countries through travel as tourists or from education.

Social remittances and social change

Social remittances are nonmaterial acquisitions of migration, such as ideas, values and practices, which often lead to social change. It might seem bold to assert that this happens 'often', but this claim is well-founded if social change itself is defined broadly. The literature on social remitting suggests that only in a minority of cases are migrants able to transfer and diffuse their ideas within the sending society. However, migrants who return to their country of origin without being able to diffuse new ideas also bring an element of social change by their very presence. Here, I am using 'social change' not in its narrower, more politicized meaning, to suggest change in the direction of greater equality. Returnees (including migrants on return visits) change societies because they add to the sum total of people in the sending country society who possess migrant experiences, memories and points of comparison, as well as ideas and practices picked up abroad.

Societies change for many reasons as well as under the influence of migration, so social remittances' role is to reinforce or, in some cases, hold back social change—for example, changing views on gender roles or changing patterns of religious observance—which is already occurring for different reasons. One aspect of social change is changing migration patterns and

here existing migrants have a particular role to play, even if the main drivers of changing migration patterns are labor markets, wage rates and so forth.

Also of fundamental importance, as highlighted by Levitt in numerous publications, is the wider transnational dimension of social remitting. Keeping to the topic of the consequences of migration for sending countries: in many cases, returning migrants maintain their transnational networks and thus their return causes change in the sending country by expanding the web of social relations and stocks of social capital linking that country to other countries abroad. However, going back to the topic of how migrants living abroad pick up new ideas in the first place, it is clear that these ideas come not just from their acquaintances based in the receiving country but also circulate transnationally. To quote White and Grabowska (2019) again:

> Rather than adopting a catch-up approach [with Central and Eastern Europe viewed as somehow 'behind', relative to the West] we see CEE and Western Europe as co-existing within multiple overlapping transnational and translocal social spaces. To some extent this is also already a single cultural space; however, there is also sufficient cultural diversity for migrants to want to transmit new ideas and practices from one location to another, in all directions of the compass (p. 35).

It follows that social remittances, like economic remittances, can also effect change on receiving societies. In our 2019 article, we describe, for example, changes in Catholic churches resulting from Polish migration to the UK.

Referring to 'transnational social space' may seem to lift the argument to some rather vague and abstract level, far from the original point of departure—Levitt's concept of social remittances as individual, person-to-person, intentional communications. However, it is possible to reconcile the two perspectives. On the one hand, as qualitative researchers, we find out about the lives of individual migrants and stayers and ask them questions about

how they acquired and, in some cases, also spread new ideas and practices. On the other hand, this gives us insights into the multitude of micro-level events that collectively change societies.

It is often better to use the term 'translocal' rather than 'transnational', particularly when ideas are travelling between pairs of specific localities rather than whole countries, as in the case of Levitt's 'transnational villagers' based in Boca Canasta and Boston. In Europe, migration is mostly an individual and family project, and it seems quite rare to find locations that send migrants to just one destination abroad. Nonetheless, individual migrants have strong ties to specific pairings of places. Of course, the influence of social media nowadays somewhat reduces the significance of local people in spreading ideas about receiving countries to their countries of origin. As my interviewee 'Ivan' remarked:

> There are lots of Ukrainians here in Poland, so [in home city] we don't particularly talk about Poland. You know, when I used to go home, when very few Ukrainians migrated, then people were really interested… Well, they might ask 'How was your job? How much did you earn?' But actually, people already know for themselves. There are lots of YouTube videos: they show everything. About prices, living conditions, etc.

Social remittances, facts and fiction

Economic remittances have a certain reality: money is something you can hold in your hand. Social remittances are not directly parallel to economic remittances. They consist both of things that most people might actually acknowledge to be 'facts' about the receiving society (for example, that schoolchildren in the UK are set less homework than children in Poland), but also of perceptions, judgements and emotional reactions that might be challenged (such as whether people behave 'better' in one society than in another). Although one might suppose that social remittances are ideas and practices typical of the receiving society, which end up in the sending society, in fact, it would be better to

think of them merely as ideas, etc., picked up by migrants while they are living in the receiving country, including misunderstandings, myths and 'fake news' of various kinds.

It is also important to remember the subjectivity of migrants' assessments. When migrants decide something is 'better' in the receiving, compared to the sending country, this 'better' refers to the specific baseline in the sending country. Is Poland a country where there is a lot of unnecessary bureaucracy? Polish migrants living in the UK sometimes assert to me that it is—drawing a comparison in favor of the UK, which they believe to be less bureaucratic and more efficient and worthy of emulation. However, Ukrainian migrants in Poland have told me that they are impressed by how Poland is pleasantly unbureaucratic—as it seems to them, comparing Poland with Ukraine.

Migration cultures

'Migration culture' and 'culture of migration' are terms which help researchers understand the cultural contexts of migrants' origin societies. As such, it seems useful to take them into account when discussing social remittances. The terms are used mostly with regard to small sending communities, as in the case of the Mexican Migration Project (Massey et al., 1993, pp. 431–466) or Horváth's (2008) article on Romania. In a narrow sense, the terms refer to a local acceptance that migration is an appropriate livelihood strategy and the expectation that people will migrate away from the small town or village. Van Mol et al. (2018, p. 2), for example, write that, 'In some locations [in Ukraine], migration seems to be a "normal thing to do".' A broader and more anthropological definition is that migration culture refers to understandings about how to do migration. Ewa Morawska (2001) refers to it as a 'socio-cultural toolkit'. I have defined migration culture as sending-community norms and beliefs about who should migrate, how, where and why (White, 2017). More recently, I have widened my definition, since culture is about more than norms and beliefs and indeed, in my 2017 book, I have looked also at practices and discourses. Migration (or perhaps more properly 'mobility') cultures include practices,

understandings of migration and narratives about migration among people who self-identify as migrants or former migrants, and their friends and relatives who are often potential migrants.[1]

Potential migrants gain knowledge about migration from a variety of sources, including when local return migrants diffuse that knowledge. They also receive ideas about migration from people who are still living abroad. Although this is not the approach taken in the scholarly literature—except in Garapich (2013)—it therefore seems appropriate to think of migration cultures as existing not only in sending communities, but also in receiving countries, wherever migrants live and swap ideas and impressions about migration. In other words, these are environments in which migrants pick up and transfer social remittances about one specific area of social life: migration/mobility.

The Polish and Ukrainian empirical study

The remainder of this chapter illustrates some of the points above by drawing on my 2019–22 research on foreigners and Polish return migrants living side by side in three smaller Polish cities with populations of about 100,000. Unlike some of my earlier projects, this research is not specifically focused on social remitting. However, the main research question is how the lives of immigrants are influenced by the fact that Poles they meet have often worked abroad themselves or have family and friends living abroad. In other words, I have been investigating the impact of (Polish) emigration on incoming migrants from other countries.

Plenty of out-migration occurs from my fieldwork cities, particularly among less well-educated and poorer people, so there exists a lively migration culture among some sections of local Polish society. Moreover, in the years between Poland's accession to the European Union in 2004 and the global economic crisis of 2008, many university graduates and students emigrated to the UK and Ireland, like young people from other locations in Poland. Since these Poles in most cases still live abroad, even middle-class

[1] When migration cultures include a strong sense that many mobility options are open, the word 'mobility' is perhaps to be preferred. See White (2022a).

people in the cities—who today can enjoy a good standard of living in Poland and would be unlikely to migrate themselves—possess ties to people in foreign countries. They have their own impressions and opinions of migration. This is the environment into which, over the last few years, several thousand foreigners (mostly Ukrainians) had come to live in each of the cities, even before Russia's invasion of Ukraine in February 2022.

Although I have already published a few articles from this research (see White, 2020, 2021, 2022a, 2022b), the main output will be a monograph titled *Polish Cities of Migration 2019–22*. I conducted 124 in-depth interviews, mostly in Russian and Polish, with 70 Ukrainians, 37 Polish circular and return migrants, and individuals from a range of other countries, from Bangladesh to Belarus.

Almost all the Poles and Ukrainians I interviewed were well-placed to report on migration cultures, since they (had) lived and often worked alongside other migrants during their time abroad. In one city, I conducted interviews in a hostel for Ukrainian factory workers. Although the Polish circular migrants who cared for older people in Germany lived with German families, they travelled between Germany and Poland on buses for Polish care-workers and swapped impressions of their work and employers. Moreover, the Ukrainian factory workers—more than half my sample of Ukrainians—often worked alongside Polish return migrants, and this opened opportunities for cross-national social remitting. In particular, the Polish workers would tell their Ukrainian colleagues about their experiences working in western Europe—information the Ukrainians could store for future use.

The Russian invasion of Ukraine in February 2022 happened while I was in the midst of my fieldwork and turned the world upside down for many Ukrainian migrants, although during 2022, Ukrainians continued to journey to Poland for work, not only as refugees. The new refugee influx also altered the situation for Poles working abroad, influencing the content of my interviews. One change was the nature of advice being remitted by existing migrants to would-be migrants based in Poland.

Karolina, whom I interviewed in April 2022, was planning to work seasonally abroad that summer. However, she commented, 'We don't know what the competition will be like for jobs. My friend who's in Holland said that lots of Ukrainians had come and there was less work. Because now the jobs will be divided between those new arrivals.'

My main purpose in the book is not to compare Ukrainians with Poles; I was more interested in interviewees' own comparisons. However, overall, similarities were more marked than differences, whether because of the shared 'post-socialist' heritage (White, 2022a), the European mobility space (White, 2020), or parallels between migrant experiences globally (White, 2022b). Similarities are particularly common in the case of social remitting linked to migration culture. This particular chapter therefore analyzes Polish and Ukrainian social remitting side by side. The book covers a wider range of remittances, including more cases of contrasts between the Polish and Ukrainian interviewees—for example, Ukrainians' appreciative comments about the perceived absence of corruption in Poland, a topic absent in the Polish interviews.

My analysis is also informed by the publications of other scholars. Polish and Ukrainian migration have both generated a considerable body of research in recent years. Studies of social remitting in particular include Brzozowska (2018), a comparative study of Polish and Ukrainian internet forums; Grabowska and Garapich (2016), an article establishing a conceptual framework for social remitting; Gawlewicz (2015a, 2015b) on attitudes toward ethnic diversity; Grabowska et al. (2017), a monograph on social remitting to three small Polish towns; Karolak (2016) on Polish return migrants and workplace cultures; Kubal (2015) on Ukrainian social remittances and legal culture; and Vianello (2013) on Ukrainian social remittances and gender roles.

Like Levitt's *Transnational Villagers* (2001), some of the above-mentioned literature is based on research in both sending and receiving locations. My own research spans both Poland and the UK. It is a weakness of my current project that I did not also

conduct interviews in Ukraine—something that is now impossible since the Ukraine where my interviewees lived has vanished forever. However, it is important to note that the literature on social remittances is always written from the perspective of sending countries. This is true even when the field of study is a receiving society—the place where migrants acquire social remittances before they potentially transfer and diffuse them.[2] If the perspective were that of the receiving country, the same phenomenon would be viewed as part of acculturation.

Social remittances scholarship on Poland takes for granted that many migrants, because of their dense web of transnational ties and relations, are still part of Polish society—something I have labelled 'Polish society abroad' (White, 2018b). Hence, their actions in the receiving society have consequences for sending societies. The visa and work permit regime meant that most of my Ukrainian interviewees were circular migrants and hence they too must have had some influence on the places in Ukraine to which they often returned despite the aspirations of many to settle eventually in Poland.

Street-level compared with more profound remittances

As is well-known, many migrants live abroad for years without making close friends among the local nonmigrant population. This seems to be often true both for Poles and Ukrainians. One example from my recent research is Agata, who had recently returned to Poland from living 20 years in a part of London heavily populated by Polish people. Agata had no British friends. She seemed not particularly well-informed about UK society. For example, she surprised me by observing that it was typical for British women not to go out to work, but to stay at home with their children as she had done: an observation that perhaps constitutes a kind of misinformed social remittance. Predictably, Agata's comments about what she liked about the UK related only to behavior in public places: smiling and driving.

[2] The reference here is to the framework of stages of remitting suggested by Grabowska and Garapich (2016).

Her remarks were typical of many Poles I have interviewed over the years:

> It [my 20 years in the UK] taught me a lot, a totally different approach to life. I like the fact that English people are 'polite' [said in English] and so open. Because I've lived in Poland now for six months and I think it's scary, society is completely different, people look at each other in an unfriendly way. They're not as nice as they were in London when we lived there. You just had to go into a shop and say something and everyone would smile at you. It's not like that here. So, there are things like that which really strike me. Another thing is about driving culture. I lived all those years in London and never had any problems connected with driving. In Poland, it's different. The most annoying thing is when people park crossing the line between two marked spaces. In London, you'd never see that. People were more considerate.

Similarly, Ewa, who had lived (mostly among Poles) in Ireland, asserted that

> It's a completely different mentality. That Irish mentality, that culture, everyone was different. They'd constantly be saying 'Hi' and talking about the weather and making contact with other people. I came back to Poland and was on the bus and tried to strike up a conversation with another passenger and she stared at me as if I was mad.

Meanwhile, Artur, a Ukrainian interviewee working from home and entirely without Polish friends, commented: 'Here [in Poland], if you're going up to your own flat, everyone [you meet in the hall or on the stairs] says 'Hello' on the way. I don't think that happens where I lived in Ukraine. If neighbors didn't know each other.' Ihor, a circular migrant also with no Polish friends, observed that, 'In Poland, people are more cultured, not so aggressive. In Ukraine, you just have to go into a shop and some

people will be making a fuss, someone in the queue will shout 'Hurry up!' Here, people are somehow not in a rush.'

The street-level quality of these impressions, based on fleeting encounters, does not mean that the same migrants, despite their limited social networks with local people, failed to pick up more profound social remittances based on sustained practices and contacts while they were abroad. One such remittance is personal development, something mentioned by many of my interviewees, for example Alicja, who commented: 'I learned how to cope on my own. To find a way of dealing with any situation.' Other Polish migration researchers have explored migrants' acquisition of human capital as a social remittance.[3] Soft skills, such as language knowledge and new understandings of customer relations, are often important to the careers of returning migrants.

However, instead of focusing on these, the rest of this chapter, as already indicated, discusses ideas and beliefs that Polish and Ukrainian migrants picked up from the *milieux* where they actually spent time while they were abroad—in other words, from being in the company of other migrants, at work, at home and when they socialized or went sight-seeing with friends. One result of migrating was that they were thrown together with co-nationals from a range of regions and social backgrounds and with different migration experiences. This was fertile soil for social remitting on the topic of how to be a migrant. It also raised profound questions about the nature of Polish/Ukrainian national identity and important practical concerns about how to find a new job.

Negativity and positivity about co-nationals

Being abroad often seems to lead people to reflect on their national identity, 'negotiating ethnicity through migration' (Ryan, 2010). As indicated in Agata and Ewa's comments quoted above, sometimes this leads to negative comparisons, although it is also possible to become more positive as a result of migration. As I

[3] See especially Grabowska and Jastrzebowska (2022), comparing data from Poland and Mexico.

illustrate below, these conclusions are not just based on the individual migrant's own experiences and reflections. They are also reinforced by—or in some cases seem to derive directly from—conversations in which fellow migrants state their opinions. These beliefs about how to behave as a migrant—either that you should expect the worst of co-nationals when you are abroad, and/or you can be proud of them—are one aspect of migration culture.

A common trope among Poles, mostly (in my observation) those working in manual occupations, is that other Poles—apart from close family and friends—are downright unhelpful and should be treated with suspicion and avoided. I have encountered such opinions throughout my research among Polish migrants since 2006; these are also discussed by scholars such as Garapich (2016a), Ryan (2010) and Gill (2010), whose article is revealingly titled 'Pathologies of migrant place-making'. I have discussed the causes of such negativity elsewhere (see White, 2018a). Here, I am more interested in the fact that Polish migrants pick up these ideas from other Poles:

> When I lived in London, *I was forever hearing* that 'A Jew will always help a Jew, an Arab will always help an Arab, but a Pole will never help a Pole. I *kept on hearing that* and I think it's partly true… Perhaps it sounds silly, but I think Poles are a nation of conmen. (Agata).

> On the whole, I'd say that Poles are quite suspicious when they are abroad… both to the native residents and to Poles. It's different there. Even in Scotland, they [Polish migrants] *would say* that, if a Pole hadn't harmed you, he'd done you a favor. There were simply bad people there who would promise something, for example, to pay for something, and then disappear. *I heard those sorts of stories*. I didn't have any such. personal experiences. (Feliks).

As indicated by the italics, both Agata and Feliks highlighted these were ideas that circulated widely among migrants.

Although Brzozowska (2018, p. 94) found in her study of social media, that Ukrainian migrants, unlike Poles, did not swap negative stereotypes about migrant co-nationals, I encountered several instances of this phenomenon. For example:

> We Ukrainians don't particularly have any sense of solidarity. It seems that's the case, *at least that's what I've been told*, but all the same, it's true, that when you're abroad, a Pole is more likely to help you than a Ukrainian. (Lev).

In some cases when interviewees complained about fellow migrants this stemmed from actual contact with poor behavior, such as heavy drinking. The idea that alcoholism was part of the migrant lifestyle and culture prompted several interviewees to highlight that contact with this culture had taught them a lesson:

> I've stopped drinking alcohol…. And the fact that I'd lived abroad perhaps had some influence on that… They [middle-aged Polish foresters] only think about drinking because what else can they do? They work, then just sit all evening; they're mostly blokes, they buy a bottle and sit and drink; they drink a lot with their friends, and say stupid stuff, and drink alcohol. So that definitely had some influence on me. (Tomasz).

Tomasz, who was in his early twenties when he went abroad, was keen to emphasize that he did not want to end up like his middle-aged fellow migrants, supporting families in Poland and leading lonely lives abroad. He learned from his migration experience what he did not want to become—hence, his decision to return to Poland and also to stop drinking.

Valerii, a keen sportsman, was similarly shocked by the culture of drinking he encountered among fellow Ukrainian factory workers in Poland. He was flattered when Poles told him he was 'not like other Ukrainians':

> Ukrainians who come to Poland, well, I don't know how to put it, they are people who couldn't make anything of their lives… After two weeks, I stopped spending

> time with them [his housemates] because they drank vodka and so forth… In my room, now it's all neat and cozy but when I first came, there were empty vodka and beer bottles and cigarette stubs… They just drink beer etc., and they never do their laundry.

However, being abroad can also have the opposite effect. As Garapich (2016b) illustrates in his analysis of Polish 'self-stereotyping', the trope of the selfish, cheating individualist co-exists with that of the resourceful, clever individual who is superior to incompetent and lazy British workers. In my most recent research, no Poles voiced this sentiment, which may have been more widespread in the early stages of Polish migration to the UK. However, there were some vivid Ukrainian examples. Brzozowska (2018, p. 90) also notes that Ukrainians 'underline their work ethic in contrast to Polish laziness and careless attitudes towards work'. My interviewee, Andrei, for example, commented: 'When we Ukrainians work, we work properly. If we start a job, we'll finish it off. Poles aren't like that. To be honest, Poles are lazy.'

The next quotation illustrates how the migration culture spreads. More established migrants feed ideas to newcomers and diffuse the stereotypes held by fellow migrants. I was interviewing a Ukrainian couple, Boris and Veronika. Liliya, a more experienced migrant, had introduced them to me and stayed in the room. At first, she sat silently, but after a while she could not resist joining in the conversation.

> Liliya: We Ukrainians know more.
>
> Boris: Yes, just comparing the warehouses where I worked in Ukraine with Poland, the Polish one needs plenty of development…
>
> Liliya: But the Poles are happy with it as it is.
>
> Boris: They don't mind the dirt and dust…
>
> Liliya: I've noticed that Poles are lazy. For example, someone just goes to an institute and does his job, but

> we're not like that, we always want to do better, do something extra, out of sheer enthusiasm.
>
> Veronika: It's because we get bored. If we finish one job, we're not going to sit idle until the end of the working day.
>
> Liliya: But Poles will drag out that boring job so they aren't given some other task to do.

Learning whether/how to use employment agencies

Labor migrants in all countries probably discuss with one another how best to find new jobs. Granovetter's (1973) distinction between strong and weak ties is relevant here. On the one hand, it can seem important to rely on strong ties—friends and family who can be asked to help. If the exact location and nature of employment in the destination country are not important to the would-be migrant, utilizing strong ties and going to someone they know seems to make sense. This is particularly true in the context of migration cultures such as exist in small Polish towns where there is an understanding that existing migrants ought to help other people migrate for the first time (White, 2017). In other cases, migrants rely on weak ties, such as employment agencies, which have a greater range of jobs to offer but cannot necessarily be trusted to act in the migrant's best interests.

In my past research on both Russia and Poland, I encountered strong suspicion of migrant employment agencies (see White, 2022a). One might expect this in societies with low levels of generalized trust, as a legacy from the period of Communist rule. However, over time, one might expect that people would develop greater confidence in formal organizations and institutions and rely less on informal networks. There is some evidence that this is beginning to happen in Poland in the case of agencies recruiting Polish carers to work in Germany—a flourishing part of today's migrant labor market (Leiber et al., 2019). Ukrainian migrants, by contrast, often do not have the option of migrating except through an agency. However, social remitting remains important because

existing migrants give advice about which agencies can be used and how to check their credentials.

My recent interviews revealed that there were still plenty of scare stories circulating about untrustworthy agencies. Here are two Ukrainian comments:

> There are agencies in Ukraine which just take your money and that's it. They will forget to process your passport and send you to Poland. So, everyone is scared…. If it's a Polish agency, it's okay to use it… Ukrainians are greedy, they want to make a lot of money fast. (Artem).

> To be honest I wouldn't risk it. I think it's a bit unreliable. Because there are lots of online reviews where people write that agencies deceive people. They promise something and when you arrive, they more or less place you in barracks. Not in good conditions. (Alla).

Similarly, a Polish return migrant, Daniel, explained how would-be migrants should behave by referring to collective wisdom:

> It's better to go to be with someone you know than through a stranger. Because not all Poles abroad are good people. You don't know who you'll end up with. You have to watch out for that. Because there were lots of stories where someone went and paid 1,000 zloties for a job and there turned out to be no work, for example. And they were left waiting at the bus stop. There are lots of stories like that which people tell.

On the other hand, some interviewees who had personally used agencies recounted how they had realized their benefits, against the prevailing opinion:

> I used to be too afraid to use agencies… but when we started to use them, about five years ago, it turned out that they were okay… I have [had] a good experience

> with agencies and I think they have improved a bit. They need their clients. But I have heard various tales. I met some people who went to Germany and paid [in advance] for their accommodation, but there was no job. I thought that didn't happen, but it turns out, it still does. (Karolina, Polish circular migrant).

In cases where it was hard to avoid using an agency, known and trusted migrants should be able to recommend an agency or employer as being reliable. Several Ukrainian interviewees stressed to me the importance of receiving such recommendations:

> There are lots of agencies nowadays, many in every city. When people you know go to Poland, and then say a place was okay, there was a good agency in a particular place… When it comes to work, I think, if you're looking for it, you should find out from people you trust, who've worked there already, who've been there and are 100 percent sure they do pay the wages. (Olga).

Similarly, Feliks, a Pole who had worked in Scotland, observed that, 'People usually go to be with someone they know. And, if later, they do find work through an agency, it's an agency that's already been checked out.'

Conclusion

Social remittances scholarship needs to take better account of the fact that many migrants associate primarily with other migrants and that, within these networks, they can acquire and transfer social remittances. For some reason, researchers tend to be most interested in social remittances consisting of the acquisition of ideas, practices, etc., typically found among nonmigrant residents of the receiving country. Quite often, migrants form only superficial impressions of such typical behavior, such as smiling on the street and careful driving. However, migration also encourages migrants to think hard about more serious matters, including their ethnic/national identity, how they and their fellow nationals are perceived in the receiving society, and the need to warn other migrants and potential migrants of disappointing behavior on the part of fellow nationals.

When they communicate with stayers in the sending country or return to the sending country for visits or to live permanently, they transmit their thoughts and experience (as well as myths and scare stories) about co-nationals and national identity.

Labor migrants also necessarily spend time considering the best ways to migrate and access employment. Once they have picked up certain ideas about how this should be done, they transfer those ideas to novice migrants as social remittances. My chapter has argued for combining the concepts of social remitting and migration culture. If migration culture is understood broadly as ways of doing and understanding migration, then it can be appreciated that there is often a lively migration culture even in receiving societies, wherever migrants collect together and influence one another's ideas and behavior, as well as transmitting ideas to would-be migrants in the sending country. This in turn can influence patterns of migration, which is a significant part of social change in many societies.

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Chapter 5

Temporary labor migration and social remittances

Philip Martin and Manolo Abella

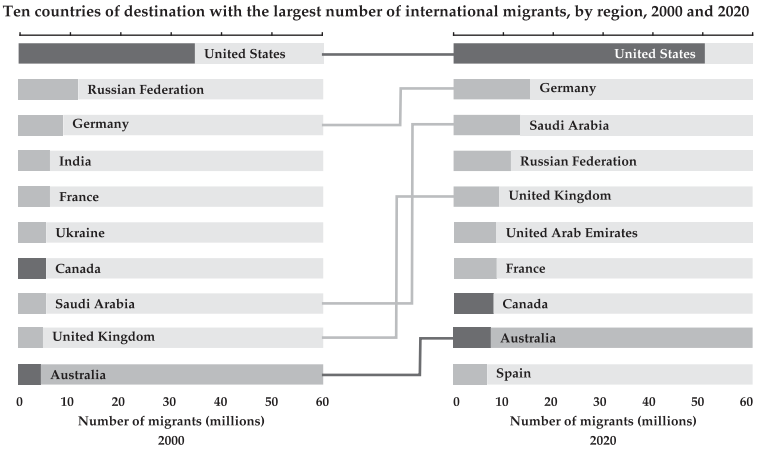
Introduction

The UN defines international migrants as persons who cross national borders and stay outside their country of birth for a year or more. The 281 million international migrants in 2020 were 3.6 percent of the world's 7.7 billion people. Europe accounted for 87 million or 31 percent of the world's international migrants in 2020, Asia for 86 million or 31 percent, North America for 59 million or 21 percent, and Africa for 25 million or 9 percent. Europe is thus the continent of migration, with a tenth of the world's people, a third of the world's migrants and half the world's social welfare spending. North America has a higher-than-average share of migrants relative to population—Canada and the US account for 5 percent of the world's people and 21 percent of the world's migrants.

Migrants

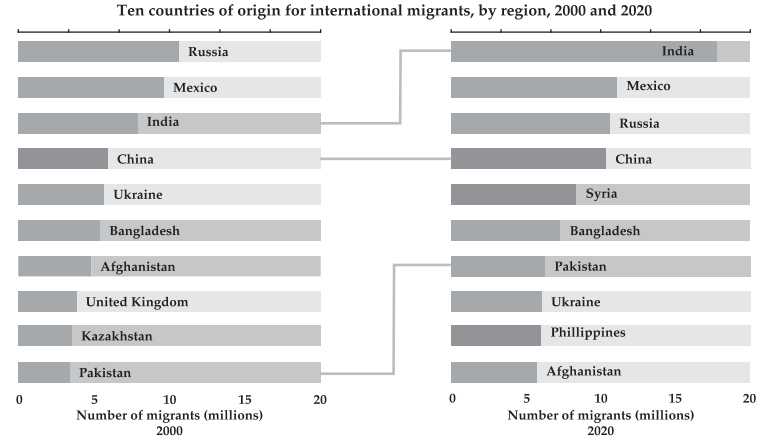
In 2020, two thirds of all international migrants were in 20 countries, led by 51 million in the US (the UN considers Puerto Ricans who move to the mainland to be international migrants), followed by Germany with 16 million migrants, Saudi Arabia with 13 million, and Russia with 12 million (Figure 1). Between 2000 and 2020, the number of migrants rose in the US and Germany and fell in India and Ukraine.

Figure 1: Leading destinations for migrants, 2000 and 2020



Source: Reprinted from *International migration 2020: Highlights* (p. 10), by United Nations Department of Economic and Social Affairs, 2020, United Nations. Copyright 2020 by United Nations.

Figure 2: Leading origins of migrants, 2000 and 2020



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The leading countries of origin changed between 2000 and 2020. The number of migrants from India rose the most, making the 18 million Indians who were abroad a year or more the largest single group of international migrants. Mexico and Russia each had 11 million citizens abroad, followed by China, Syria, and Bangladesh (Figure 2).

Most international migrants cross national borders but stay close to home. In circular flow charts of migration flows, the thickest arrows represent intra-regional migration, as from one European country to another. One exception is North America, where most migrants are from Latin America and Asia.

Most migrants move from poorer to richer countries. There are several ways to classify countries by their level of income. The UN distinguishes between developed and less developed countries, and reported 157 million migrants in developed countries in 2020 (56 percent) and 123 million migrants in less developed countries. The World Bank defines high-income countries as those with per capita incomes of USD12,500 or more; in 2020, such countries accounted for 182 million or 65 percent of all international migrants.

The World Bank's high-income countries attract migrants from lower-income countries as well as from other high-income countries. Most migrants in high-income countries were from upper-middle-income countries, as when Mexicans move to the US. The second-largest group were from other high-income countries, as with Canadians in the US. The third largest group of migrants were from lower-middle-income countries, as with Hondurans in the US. The 53 high-income countries include micro-states such as Monaco and areas including Puerto Rico, the US Virgin Islands and Hong Kong.

Migrant workers

The ILO (2018) estimates that there were about 164 million migrant workers in 2017, meaning that two thirds of all international migrants were part of the labor force in their host

country.[1] The distribution of migrant workers closely tracks the distribution of migrants, with a third in Europe, almost a third in Asia and a quarter in North America. The stock of 96 million male migrant workers represents 58 percent of all migrant workers, 87 percent of whom are aged 25–64 years.

The 111 million migrant workers in high-income countries in 2017 represented 18 percent of the 600 million-strong workforce in these countries. Almost half of all migrant workers in 2017 were based in North America and Europe. There was rapid growth in the number of migrant workers in upper-middle-income developing countries between 2013 and 2017. Mires and Kuptsch (2022) emphasize the wide range of programs under which migrant workers are employed, from unilateral programs to bilateral agreements to free-migration regimes.

Mexico

Mexico, a country of 130 million with almost 10 percent of persons born in the country living abroad, is the major source of emigration in the Western hemisphere and the primary source of migrants to the US. Mexico-US migration has a long history, but most of the 12 million Mexican-born US residents arrived after 1970 after a short-lived economic boom linked to the discovery of offshore oil ended with a collapse in the value of the Mexican peso in the early 1980s. A small US border control force (more police guarded the US capital in the early 1980s than the Mexico-US border), the absence of federal laws penalizing US employers who knowingly hired unauthorized workers, and networks established during Bracero Program guest-worker migration between 1942 and

[1] The UN emphasizes country of birth when defining international migrants, while the ILO emphasizes citizenship. This means that naturalized citizens working in the country in which they acquired citizenship are international migrants (because they were born in another country) but not migrant workers (because they are citizens of the countries where they work). Border commuters who live in their country of citizenship but work in another country are foreign workers by the ILO definition but not international migrants by the UN definition.

1964, allowed unauthorized Mexico-US migration to increase between the 1980s and the 2008/09 recession.

Migration and remittances

The Immigration Reform and Control Act (IRCA) of 1986 aimed to (i) prevent more unauthorized Mexico-US migration by legalizing Mexicans and other unauthorized foreigners who had lived in the US for at least five years or who had done qualifying farm work, and (ii) close the labor market door to unauthorized workers by penalizing US employers who hired them knowingly. More border patrol officers made illegal entry more difficult and expensive, and sanctions on employers who hired unauthorized workers was expected to reduce Mexico-US migration as migrants realized that, even if they eluded the border patrol, they could not get US jobs.

IRCA backfired spectacularly. Some 2.7 million unauthorized foreigners, 85 percent of whom were Mexican, were legalized in 1987/88, becoming eligible for immigrant visas and naturalization. Over 40 percent of those legalized were young solo male farm workers, many of whom bought documents attesting that they had been engaged in US farm work in 1985/86. This false-documents industry expanded in the 1990s, fueling continued illegal immigration as newly arrived unauthorized workers presented counterfeit work authorization documents to employers that allowed the latter to escape sanctions.

The two decades between the end of IRCA legalization in 1987/88 and the 2008/09 recession saw the movement of over 10 million Mexicans to the US. Many Mexican migrants returned to Mexico, and this circulation transferred both financial and social remittances to migrant areas of origin. Mexico was changing for other reasons too, including a revised economic policy that shifted from protecting local industry from imports to free trade and a change in economic policy symbolized by the North American Free Trade Agreement (NAFTA) in 1994—the first free trade agreement between industrial and developing countries.

Mexico underwent many changes in the 1990s and 2000s. NAFTA and globalization made many rural youth realize that they were never going to climb the economic ladder if they continued to farm as their parents and grandparents had done, prompting rural-to-urban migration within Mexico. The weakening of the dominant political party, the Partido Revolucionario Institucional, which had been in power since the 1920s, resulted in the election of an opposition party president in 2000 and more transparency in government, including the expansion of a conditional cash transfer program (Progresa-Oportunidades-Prospera) that made monthly payments to mothers who kept their children in school and took them for regular health checks.

It is hard to disentangle the effects of social remittances from other factors that have been reshaping Mexico over the past several decades, especially in the rural areas that were the homes of many US migrants. During the 1990s, when many Mexican migrants circulated between seasonal US farm jobs and homes in rural Mexico, many built or improved homes in rural villages that became a source of pride as well as envy. Lopez (2015), for example, focuses on how migrants from rural Jalisco changed their hometowns, including migrants whose US-style homes demonstrated that their upward mobility in Mexico was due to working in the US (Figure 3).

The need to navigate poor roads to reach these migrant-built homes, and the lack of infrastructure in many migrant-sending villages, led to social remittances in the form of Mexico's 3x1 program. Communities that raised USD1 in donations from migrants abroad for village improvements received USD3 more in federal, state and local monies to pave roads and provide water, sewerage and other infrastructure. The 3x1 program led to conflicts between US-based migrants who wanted to repair churches and public squares for weddings and festivals and nonmigrants who wanted basic water and sewerage infrastructure.

Figure 3: A US-style home in rural Mexico reflecting migrants' upward mobility

Source: Reprinted from 'The Mexican McMansions that dream of America,' by H. Tricks, 2019, *The Economist*. Copyright 2019 by The Economist.

The Mexican economy and society have evolved to feature a dynamic and export-oriented agricultural and manufacturing sector in the central and northern states, and lagging development and poverty in the southern states. Two sectors symbolize the promises

and perils of the new Mexico. The automobile industry employs about 5 million workers in Canada, Mexico and the US, most of whom are secondary-school graduates who are Canadians in Canada, Mexicans in Mexico and Americans in the US. The agricultural sectors of Canada, Mexico and the US also employ about 5 million wage workers, but most were born in Mexico and many migrate internally within Mexico or from Mexico to Canada and the US. A closer look at Mexican farms that export fresh produce highlights an important form of indirect social remittances.

Export agriculture

Mexico is the world's largest exporter of fresh avocados and tomatoes, and its agricultural export sector employs a quarter of the country's 3 million hired farm workers. Mexico-US agricultural trade has increased since NAFTA came into effect on 1 January 1994. The US ships mostly grain and meat to Mexico and imports more valuable fresh fruits and vegetables, giving Mexico an agricultural trade surplus with the US since 2014.

Mexico's agricultural trade surplus with the US has widened over time for several reasons. The first is US consumer demand for fresh fruits and vegetables year round. Mexico's major competitive advantage is a climate that allows it to produce and export many fresh fruits and vegetables between December and May, months when there is little US production. The US imports 60 percent of its fresh fruit and 35 percent of its fresh vegetables; Mexico supplies half of US fresh fruit imports and three fourths of US fresh vegetable imports. Bananas are the largest US fresh fruit import, but the fastest growth in US imports of fresh fruit has occurred in avocados, blackberries and raspberries, which come mostly from Mexico. Almost all US fresh tomato imports are from Mexico, but the growth in these imports has been slower than the growth in berry and other high-value fruit imports.

Second, Mexico has a latecomer advantage in producing many fruits and vegetables in controlled environment agriculture (CEA) structures, often plastic-covered hoops rather than glass greenhouses that protect plants from pests and disease, raise

yields and facilitate organic production. Farm work becomes more akin to factory work on export farms as employees enter and exit CEA structures though designated portals and both plants and people are monitored, making it easier to track shipments to where they were grown and who handled them.

Third, wages in Mexican export agriculture are two or three times the country's minimum wage, but only an eighth of US farm workers' wages of USD12–17 an hour (Escobar et al., 2019). Labor costs are often 30–50 percent of production costs for fresh fruits and vegetables and, even if inputs from plants and seeds to packaging must be imported, Mexican produce can be delivered by truck to US buyers at competitive prices.

Mexico's export agriculture is thus poised to expand. Local and foreign investment in protected culture farming is increasing due to general and specific investment in infrastructure that is conducive to the production of high-quality fresh produce for export. For example, berry cultivars are being developed for Mexican growing conditions, while improvements in transportation that serve automobile and other export manufacturers, also facilitate the transportation of agricultural exports to the US.

The success of Mexico's export agriculture reflects social remittances. Most managers of Mexican export farms speak English and are familiar with US food safety regulations, and the risk of having US-bound shipments rejected at the border guarantees a high level of compliance with US food safety laws. Some workers employed in Mexican export agriculture also work as H-2A guest workers in US agriculture, so that the best workers finishing a berry harvest in central Mexico in April may be recruited as guest workers in the US during the summer months.

Mexico's export agricultural sector reflects the tensions between new and old in a fast-changing country. Freer trade has uneven benefits, and Mexico has one of the world's most unequal distributions of income and wealth. Proponents of further expansion of Mexican export agriculture, including ex-migrants or those whose relatives were migrants, believe that export agriculture provides good jobs for Mexicans with little education.

Critics, on the other hand, see export agriculture as another way for the US to exploit Mexican water and labor resources.

Mexico's fundamental economic problem is slow productivity growth. Even though the number of average years of schooling rose from almost eight to ten years between 2000 and 2020, productivity growth averaged only 0.5 percent a year. Mexican economist Santiago Levy (2018) argues that Mexico's slow growth is due to a persistent misallocation of resources, with too much labor and capital going to informal firms that evade taxes and regulation, and not enough to formal firms that are globally competitive (Table 1).

Table 1: Employment in Mexico, by size of locality and formality status, 2000–13

	2000		2003		2008		2013	
	A	**B**	**A**	**B**	**A**	**B**	**A**	**B**
Locality > 2,500								
In census [a]	17,060	64.0	18,099	61.3	19,348	57.8	21,949	57.0
Not in census [b]	8,490	75.2	9,399	76.9	9,989	83.2	11,048	82.4
Locality < 2,500								
Activities in census [c]	3,589	71.7	3,782	72.3	4,110	77.6	4,734	76.9
Agriculture	6,522	85.1	6,036	87.5	5,945	91.5	6,615	89.8
Public sector workers	4,367	19.4	4,520	20.1	4,926	12.2	5,197	14.2
Total	40,030	54.7	41,838	56.7	44,319	58.0	49,544	58.2
Census/total [d]		42.6		43.2		43.6		44.3

Note: A = number of workers ('000). B = Share of informal workers (%).

a = in establishments with fixed premises that work in activities included in the census, b = in activities excluded from the census or included in it but carried out in establishments with mobile premises, c = in fixed or mobile premises, d = share of total employment captured in the census

Source: Adapted from *Under-rewarded efforts: The elusive quest for prosperity in Mexico* (p. 79), by S. Levy, 2018, Inter-American Development Bank. Copyright 2018 by Inter-American Development Bank.

As a result of growing gaps between formal and informal firms, and between salaried and nonsalaried workers, there are distortions in Mexico's social insurance system and tax burdens. The net effect of these formal-informal differences is that larger formal firms with salaried workers subsidize informal firms with

nonsalaried workers—exactly the wrong prescription for increasing productivity and incomes.

Most export farms are in the formal sector, while 85–90 percent of farms that produce for the Mexican market are informal (Escobar et al., 2019). This means that export farms enroll their employees in the social security system, the Instituto Mexicano del Seguro Social (IMSS), and pay taxes of 25–30 percent of their wage bills to the IMSS so that their employees have access to a comprehensive range of social services, from health and childcare to bonuses and pensions. However, the IMSS often fails to deliver these services, especially to migrant and seasonal farm workers, so that both employers and workers value IMSS benefits at far less than their cost. The social remittances aspect of the IMSS dilemma is that ex-migrants often lead protests against deficient Mexican government institutions.

Most US buyers require their Mexican suppliers of fresh produce to comply with all Mexican labor laws, including enrolling their employees in the IMSS. However, the failure of the IMSS to deliver promised services gives employers an incentive to organize their businesses to minimize IMSS taxes by, for example, hiring and laying off workers frequently and relying on labor contractors who pay workers in cash to bring workers to farms. Policies that encourage employers to reduce their IMSS payroll tax liabilities discourage investments that could raise productivity over time.

Mexican export agriculture is an example of an industry centered in previous emigration areas that now attracts internal migrants. The industry is a success in the sense that US growers became familiar with Mexican farming areas via labor migration and recognized opportunities to promote trade in place of migration for some commodities during certain times of the year. The result was much less out-migration and a new in-migration to farms that export fresh produce from poorer regions of Mexico.

The future of Mexico's export agriculture depends on decisions made in both Mexico and the US. Mexican President Andres Manuel López Obrador (AMLO) wants to return to 1970s

nationalistic economic policies when state-owned enterprises such as Pemex dominated the economy. AMLO promised a fourth revolution, after independence from Spain, the nineteenth-century liberal reforms and the Mexican revolution of 1910–17, to reduce poverty by curbing the power of the elite that AMLO believes has kept many Mexicans impoverished.

One strategy to reduce poverty in areas of Mexico that send migrants abroad is to raise the minimum wage. AMLO supported rapid increases in the minimum wage and introduced a higher minimum wage in Mexican states near the US border where living costs are higher. The question is whether his populist strategy will help workers remain in the formal sector and benefit from higher minimum wages or wind up enlarging the informal sector that already employs most Mexican workers.

Next steps

Mexico is at something of a crossroads in politics, economics and migration. AMLO's six-year term ends in 2024 and the question is whether his Morena party can retain power and continue to implement a policy of energy self-sufficiency, which has increased tensions with NAFTA partners Canada and the US. The economic uncertainty is whether formal job growth can resume. Mexico has a labor force of almost 60 million, but only 20 million workers are enrolled by their employers in the IMSS system that usually defines formal jobs.

Migration is the final uncertainty. During Covid-19 border closures, the US returned most unauthorized Mexicans encountered just inside the US border to Mexico under Title 42, a public health measure that allows unauthorized foreigners to be returned quickly without penalty, encouraging many to try to re-enter the US. One result was an upsurge in Mexicans trying to enter the US illegally, sometimes multiple times. Since most migrants rely on smugglers who charge them USD5,000–10,000, Mexicans who succeed in entering the US typically seek year-round jobs in cities rather than seasonal farm jobs.

Mexico has changed over the past quarter-century, especially in the rural areas that were the major source of migrants bound for US farm jobs. Declining fertility, rising incomes and expectations, and more integration with Mexico and North America have made many rural Mexican youth aware they cannot get ahead living and working if they follow in the footsteps of their parents and grandparents. As these rural youth change their residence and occupation, the question is whether they will stay inside Mexico or seek upward mobility outside Mexico.

The Philippines

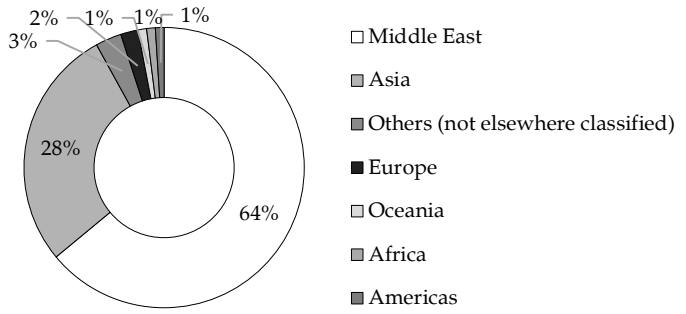
The Philippines is a country of 114 million that began to send large numbers of migrant workers abroad in an organized fashion in the 1970s. Citing Korea's success in overseas project contracting in the mid-1970s and with the rising cost of oil imports, President Ferdinand Marcos Sr (1965–86) encouraged Filipino construction companies to venture out of the country as well and send their workers overseas. Indonesia followed suit. Soon, labor migration accelerated as construction activities boomed in the Gulf states and as neighboring states and territories in East Asia felt labor shortages. The political crisis in the Philippines in the 1980s and its economic consequences led to more migration, partly to generate the remittances needed to repay World Bank loans. What was intended as a temporary policy became permanent due to the demand for Filipino workers abroad and slow economic growth at home. Ferdinand 'Bongbong' Marcos Jr, elected president in 2022, promised to 'market' Filipino workers abroad (Balba & Kingan, 2022).

Migrant workers

Some 2.5 million Filipinos were working as temporary contract labor in over 100 countries in 2020, filling jobs that ranged from domestic service to construction, transport and stevedoring. Most female migrants are domestic service workers in the Gulf states, Hong Kong and Singapore, and in European countries such as Italy and Spain, while others are healthcare workers such as

nurses (Figure 4). Over 500,000 Filipino men are employed on ocean-going ships, including container vessels and cruise ships.

Figure 4: Proportion of land-based Filipino migrants, by destination



Source: Adapted from *The Philippines: Beyond labor migration, toward development and (possibly) return* (fig. 2), by M. Asis, 2017, Migration Policy Institute. Copyright 2017 by Migration Policy Institute.

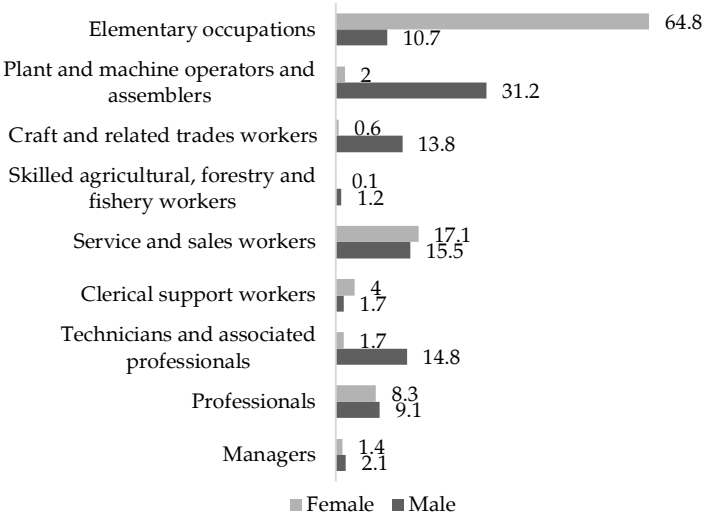
The Philippines received USD34 billion in remittances in 2019 and USD33 billion in 2020, reversing the trend of ever-increasing remittances. Remittances reduce poverty in the households that receive them and their impact is often evident in upward mobility for children who are able to complete school and receive more healthcare. Tusalem (2018) argues that Filipino provinces with more migrants and remittances have higher levels of 'governmental effectiveness and higher levels of human development.'

In addition to income and insurance for relatives at home, migrants abroad can help others obtain jobs overseas by acting as intermediaries between employers abroad and potential migrants at home. Migrant workers abroad can also provide both information and job offers, helping to explain why migrants from a particular town or village tend to be concentrated with particular employers, industries and occupations abroad.

Filipino temporary migrant workers—or overseas Filipino workers (OFWs)—are found in all regions of the world and in countries with a variety of political systems, cultures and

religions, from the Kingdom of Saudi Arabia to the liberal democracies of Italy and Canada. In 2021, some 64 percent were working in the Gulf states and 28 percent in other parts of Asia. Filipino migrants include many low-skilled workers such as domestic helpers, as well as professionals such as nurses, teachers and mining engineers (Figure 5). The large majority are on temporary work contracts, often for one to two years, but in certain occupations such as domestic service, contracts are usually renewed or extended so that some may stay in their destination countries for six to ten years.

Figure 5: Overseas Filipino workers by occupation and sex, 2021



Note: Reference period is April to September 2021. Estimates were based on the 2015-based population projections.

Source: Adapted from *Survey on overseas Filipinos* (fig. 3), by Philippines Statistics Authority, 2022. Copyright 2022 by Philippines Statistics Authority.

If those who settled in their destination countries are added to the stock of OFWs on temporary contracts, the share of Filipino migrants in Europe rises to 9.3 percent, while 8.9 percent are in North and South America. Of the Filipinos who migrated to an

OECD country, most are long-time residents. The OECD (2008) reported that 65 percent have been there for ten years or more, and 20 percent between six and ten years. Over half of them have tertiary education and 40 percent are technical or professional workers.

Social remittances

The social remittances associated with Filipino migration are significant but hard to measure. For example, families with a migrant abroad have better access to social protection in the form of remittances, which compensates for missing government services in low-income families. Remittances enable children at home to continue their education and to receive healthcare, and provide income and healthcare for older household members who have little or no income of their own.

What 'social remittances' might be expected from this population of Filipinos working and living in foreign countries, many for temporary periods and the rest more permanently? Social remittances include views on democracy or good governance, consumption and lifestyle preferences, religious values, educational aspirations, and views on marriage and family. Some postulate a possible impact of remitted economic ideas on changes in the technical sophistication of the origin country's exports (see Valette, 2018),[2] but few studies show how these ideas and information are passed on or 'remitted'. Whether or not the internet and social media play an important role in the transmission of ideas has yet to be investigated.

Data from national surveys, including those on migrant populations, do not include social remittances, and so specially designed surveys are used to generate relevant information. Kessler and Rother (2016) surveyed 2,000 respondents in the

[2] Valette found that technological transfers are more likely to occur when the intensity of emigration is high and when technology levels in destination countries are high, thereby suggesting that productive knowledge is indeed transferred by migrants from receiving to sending countries. See Tuccio and Wahba (2020).

Philippines, of whom 1,000 had returned from six destinations in Asia and the Middle East, to look for evidence of the impact of migration on attitudes toward democracy, using the destination country as a variable to determine if political views changed due to migration. They compared the views of returnees to those of newly departing migrants, and concluded that the political system of the destination is a less decisive factor than the specific freedoms and restrictions experienced by migrants before they left.

Assessing social remittances is difficult in the case of the Philippines as emigration includes a large variety of occupations and a large number of destination societies with very different political systems and at various stages of economic development. Moreover, emigrants are from all over the country and social remittances are thus likely to be widely diffused, raising questions as to whether it is possible to establish any connection between migration and behavioral changes in origin communities. In sum, while the emigration of Filipinos, both temporary and permanent, may have significant return flows of 'social remittances', it is hard to find solid evidence of them.

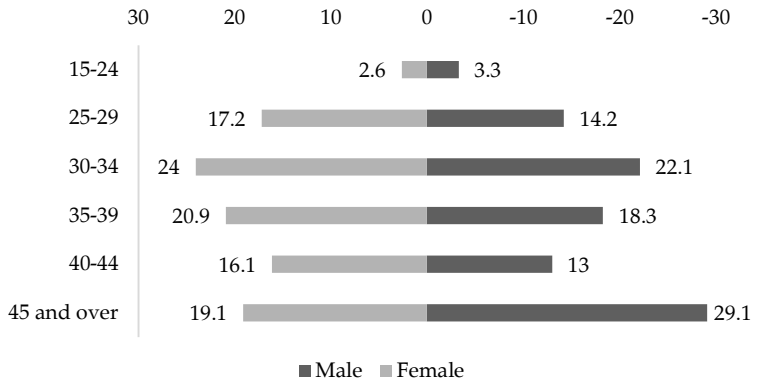
Periods of employment and stay abroad vary considerably by type of job, from construction to nursing and from clerical to professional. While most low-skilled migrant workers have temporary job contracts, for example, lasting one to two years, average stays abroad tend to be longer because their contracts are often renewed by employers. This is especially the case for those who work as nurses as well as domestic workers. Given the size of its population working overseas, there is good reason to assume that the Philippines receives significant 'social remittances'. Unfortunately, this is a consequence of migration that is impervious to measurement, especially in view of the large diversity of societies where Filipinos live and work, as well as the diversity of regions from which they originate in the Philippines.

Scholars such as Daway and Ducanes (2015) have suggested that migration, especially that of women, may have contributed to the decline in fertility rates in the Philippines since 1990. The participation of women in migration grew rapidly from the mid-

1980s when employment opportunities for domestic service opened up, first in neighboring East Asian countries and territories, and later on a bigger scale in the Middle East and parts of Europe, particularly for caregivers.

In 2021, women constituted 60.2 percent of the migrant workforce. Over 72 percent were of prime childbearing age—less than 39 years old. Although migrant women still constituted only 6.2 percent of the total women in the Philippines in this age group, it is not unlikely that their absence has already had an impact on fertility rates. Moreover, many more women aspiring to work abroad are very likely postponing marriage or, if already married, not having more children. In 2013, over half of all migrant women were single, compared to less than a third among those still in the country. Migrant women who were married also had fewer children (an average of 2.2) than nonmigrants (2.7).

Figure 6: Overseas Filipino workers by sex and age group, 2021



Note: Reference period is April to September 2021. Estimates were based on the 2015-based population projections.

Source: Adapted from *Survey on overseas Filipinos* (fig. 2), by Philippines Statistics Authority, 2022. Copyright 2022 by Philippines Statistics Authority.

Similarly, according to the 2021 survey of the Philippine Statistical Authority, there were some 1.8 million Filipino contract workers overseas—a 3 percent increase from the previous year.

Over 60 percent of them were women (1.1 million) among whom 43 percent were below 39 years of age (Figure 6). Although there has been no study yet to link fertility rates to migration, it is highly likely that the absence of these many people, both women and men, affects the number of children of those who are married and delays marriage for others, so that migration has contributed to the decline in total fertility rates. The more relevant question here is whether this decline in fertility rates may be considered a behavioral change due to 'social remittances' or simply an inevitable consequence of migration.

Table 2: Trends in total fertility rates, urban population growth and women's migration

	1950–55	1970–75	1995–2000	2007/08	2022	1950–55 to 1970–75 %	1970–75 to 1995–2000 %
Total fertility rate (%)	7.3	6.0	3.6	3.3	2.73	-17.8	-40
Urban pop. growth (%)		4.27	2.07	1.49	1.9		
Average annual OFW deployment ('000)		36	762	1,077	1,800		
Women (%)			57.3	54.2	60.2		

Sources: (i) Underlying factors in international migration in Asia: Population, employment and productivity trends, by G. W. Jones, 2008, International Labour Organization; (ii) 2008 world population, by Population Reference Bureau, 2008; (iii) Philippine statistical yearbook, by Philippine Overseas Employment Administration, n.d.

The decline in fertility rates is often associated with urbanization (Table 2). Women moving to urban areas tend to postpone marriage and the cost of having children is higher in the cities than in rural areas. However, in the Philippines, urban population growth dropped precipitously in 1990 perhaps on account of the change in definition of the smallest political unit (the *barangay*) in the Philippines. Since then, however, the rate of growth of the urban population has continued to slow down.[3] The

[3] For the Philippines, an area is urbanized when it is a city or municipality with a population density of at least 1,000 persons per square kilometer or, regardless

share of the urban population changed only slightly from 46 percent in 2011 to 48 percent in 2021. Urbanization may have been a contributing factor in the decline in fertility rates, but other factors such as employment opportunities for women at home and abroad have also played a role.

Migrant workers often vote in Filipino national elections, but little is known about how migrant voting patterns are influenced by the experience of working abroad. In the last presidential elections (2022), the Philippine Commission on Elections reported that at least 471,678 Filipinos abroad—28 percent of the more than 1.6 million Filipinos abroad who registered—were able to vote.

Filipino overseas workers in Saudi Arabia, the UAE and Hong Kong voted overwhelmingly for Marcos, as did many in liberal democracies such as Australia and Canada. However, Filipino political parties do not represent competing political ideologies and voters are often swayed by regional loyalties and personalities.

Conclusion

Migration means change, for migrants as well as for their origin and destination countries. Social remittances emphasize the noneconomic changes associated with international migration, including raising expectations for upward mobility and enabling children in families receiving remittances to acquire more education and healthcare. The effects of social remittances are often indirect and intergenerational, as migrants achieve their goals by moving from rural to urban areas or their children acquire the education needed to move up the economic ladder.

Levitt and Lamba-Nieves (2011) emphasize the norms, practices, identities, and social capital that circulate between origins and destinations. Some of the field research on social

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of population size, it has achieved certain characteristics—the presence or number of certain types of business establishments. The smallest political unit, the *barangay*, was earlier considered urban when it had a population of 1,000 per square kilometer. This definition was later changed to 5,000 per square kilometer.

remittances focuses on the organizations created by migrants abroad to influence economic, social and political conditions at home. Some migrants donate monies from their foreign earnings to provide missing public services at home, and migrants who become familiar with government services may ask why their own governments cannot provide similar services at home.

One important impact of social remittances is the example of hard work that brings rewards. Interviews with returned migrant workers often reveal an emphasis on how hard they have worked abroad, explaining that such work is well organized so that it is continuous—in contrast to production systems at home that may stop frequently due to lack of supplies, electricity or other factors. Establishing rules and procedures to facilitate both production and living together may be among the most important social remittance.

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Chapter 6

The comedian, the poet and the philanthropist: Transnational cultural actors and social remittances between Dubai and southern Iran

Amin Moghadam

Introduction

This chapter examines social remittances in the transnational context of southern Iran and Dubai in the UAE. By considering how various geographical scales, social actors and their practices, and power relations involved are articulated, it will look into the ways social remittances are constituted and transmitted in the transnational spaces of the northern and southern Gulf shores (see Levitt & Schiller, 2006; Boccagni et al., 2016; Levitt, 1998; Lacroix et al., 2016). The notion of social remittance 'calls attention to the fact that, in addition to money, migrants export both positive and negative ideas and a variety of values, behaviors, skills, organizational forms, and know-how back to their sending communities' (Boccagni et al., 2016, p. 4). I will focus on individuals involved in cultural and social projects such as a literary association formed by Iranian migrants, a theatre troupe or philanthropic activities. By looking at the trajectories of individuals involved in transnational practices, I will attempt to understand their positionality, their own relationship and narrative on the modalities of their involvement, and investigate their role as mediators of transnational cultural circulations (Levitt, 2020). The latter are a constitutive element of transnational social spaces and, as such, an ideal focus for observing and analyzing social remittances.

This chapter postulates that it is necessary to investigate social remittances through an analytical framework that pinpoints the opportunities and resources as well as the potential and actual obstacles and structures at play in a given historical and geographical context. They are developed through complex sociohistorical and conjunctural relationships, they evolve over time and can be appropriated, instrumentalized or modified by a variety of social and political actors, ranging from individuals to the state, via migrant associations or other forms of transnational organizations. Social remittances are constituted and transmitted as a function of the relationship between actor autonomy and contextual structures. This relationship characterizes and drives the engagement of social actors, such as individual project promoters and carriers, in transnational practices and spaces (see Lacroix, 2014; Ma Mung, 2009; de Haas, 2021; Bakewell, 2010). Research into social remittances and the conditions under which those involved may act (structure/autonomy) also enables us to consider the links of interdependence that connect the different fields of practice, for example, the cultural and political domains and how they interact through transnational links. Taking into account the temporalities of the formation, evolution and even disappearance of transnational social spaces allows us to question why and how certain ideas and practices circulate within these spaces for a given time, endure or, on the contrary, become obsolete, disappear or operate on new registers.

Methodology

From the methodological point of view, this chapter is a result of a long-term reflection on Iran's relations with its regional environment since 2010 through the fields of social and cultural practices. Between 2010 and 2013, during fieldwork for my doctoral dissertation focusing on Iranian migration to Dubai and transnational practices between the Iranian and UAE shores of the Gulf, I met and interviewed several Iranian groups and individuals in Dubai engaged in various associative and cultural initiatives: literary associations, the benefactors' association, film screening evenings, a theater troupe, and producers of Persian-

language magazines, often published in Iran and distributed in the UAE. In the years following my thesis, especially 2021 when I returned to Dubai to stay for three months (March to June 2021), I reconnected with some of the people who, ten years earlier, had generously hosted me at cultural events they had organized and granted me interviews. These new encounters in 2021 were rich in ideas for this chapter, as they enabled me to put into perspective the evolution of these practices over time by taking into account the evolution of political, geopolitical and urban contexts. Some individuals from these backgrounds also gave me access to their personal archives with photos, articles in Emirati and Iranian newspapers or personal notes that I used when writing this chapter.

Transnational context between two shores of the Gulf

On a visit in 2018 to the southern Iranian town of Evaz, which has a population of 20,000, a journalist from the Iranian government daily *Iran* expressed his surprise by writing: 'This is not Switzerland, it's Evaz.' He was referring to the numerous urban facilities developed in this city located in the so-called peripheral regions of Iran. He visited the city's four active universities, its many schools and sports facilities, and noted, in every corner of the town, the names of personalities who had financed the construction of urban infrastructure. Although in two brief passages, he points out that some of these personalities live in Dubai and Kuwait, he fails to mention the importance and contribution of the influx of money from the Arab shores to the Iranian coast, and to highlight the minority position of the city's inhabitants, the majority of whom are Sunni in a country that is 90–95 percent Shia. Stressing the importance of public participation by the inhabitants of these towns at local level, he concluded from his visit that the town of Evaz should be a model of development and public participation for the whole country, without mentioning that this development, unique in Iran, stems from transnational dynamics between the opposite shores of the Persian Gulf.

Indeed, the development of charitable networks by Iranian migrants living in the Arab countries of the Gulf and, more generally, the circulation of monetary flows, have largely transformed the infrastructure and even the modes of governance of the cities in this region. This situation resembles many other transnational contexts studied in the substantial transnational literature on economic remittances (see de Haas, 2005; Carling, 2014; Eckstein, 2010; Withers et al., 2022). But the description of this situation by a journalist from the official Iranian government newspaper, and his omission of these transnational and minority elements, reveal the paradoxes and specificities of this transnational situation.

The entrenched presence of southern Iranians in the UAE results from more than a century of peregrinations, as well as from the establishment of new political and economic structures following the creation of new countries on the southern shore of the Gulf (the UAE was declared independent in 1971) (Stephenson, 2018; Moghadam, 2021). It also stems from the chaos in Iran (the Islamic revolution of 1979, the Iran-Iraq war during 1980–88) and discrimination felt particularly by the Sunni populations of southern Iran in a Shia-majority country, that have prompted southern Iranians to build their lives in Arab countries. Several events prompted these movements, such as the ban in 1936 that prohibited women from wearing the veil in Iran, based on the principles of Westernization of that time. These measures triggered waves of emigration of Sunni (including Persian) and Shiite inhabitants, who regarded the new rules as heretical and morally unacceptable. During this time, on the one hand, Iran's peripheral regions seemed to be increasingly integrated with the national territory, notably thanks to the construction of an important infrastructure network (including the railway line connecting the Caspian Sea to the Persian Gulf that was put into service in 1927) (Kashani-Sabet, 1999). On the other hand, populations located in the so-called periphery of Iran, especially in the south, continued to emigrate to the southern Gulf, while also maintaining ties with the Iranian coast via exchanges now considered illegal by the Iranian authorities.

On the southern shore of the Gulf, southern Iranians participated fully in the development of cities both before and following the discovery of oil in the region. Marginalized in Iran but taking advantage of affinities with the culture of the host country, they established relations with Arab families already present, and marriages between the two groups were commonplace, often facilitated by cultural, religious and linguistic proximities. The transnational space discussed here is thus part of the center-periphery dynamics both propelled by and constitutive of the processes of nation-state formation on either side of the Gulf, which impact the positioning of minority groups in this context.

It is also important to emphasize the nature of relations between the Iranian state and its citizens resident abroad in recent years since the Iranian revolution of 1979. First, Iran is not a migrant-sending country as such, in the sense that it has never had an explicit policy of sending its citizens abroad. Second, since the revolution, the regime has constantly tried to distinguish, or even separate, Iranians living inside Iran from those living abroad, often considering the latter as potential or de facto opponents (Mobasher, 2018). This view of Iranians abroad by Iranian authorities has fluctuated somewhat, depending on democratic dynamics or, on the contrary, autocratic or even totalitarian turns taken by the Islamic republic since its establishment in 1979. However, the recent protests in Iran, which began in September 2022 under the slogan 'woman, life, freedom', have shown that the narrative separating Iranians at home from those abroad can be weakened and challenged: the protest movement has been strengthened by symbolic and effective links between Iranians at home and those in the diaspora, despite its political and social fragmentation.

Links between the state and Iranians abroad also waver according to the history and modalities of Iranian immigration in a given geography. For example, it would be simplistic to talk about Iranians based in the US in the same way as those living in the Emirates—on the one hand, because of the ways they integrate with the US and the possibility of obtaining American citizenship,

and on the other, for historical and political reasons linked to the formation of the Iranian diaspora in the US and the possibility for Iranians there to form networks and groups that position themselves in relation to the tense (geo)political relations between the two states. These latter relations have always affected the links between the Iranian-American diaspora and the Iranian state (Malek, 2019).

In comparison, even if relations between the Iranian and Emirati authorities have also undergone periods of animosity or collaboration over the last 40 years, the anchoring of the two countries in the shared historical and cultural regional environment of the Persian Gulf, and their relationships as neighbors, give rise to interdependent relations of quite a different nature between the two countries, but also between the inhabitants of the two shores, including with regard to Iranian migrants on the Arab shores of the Gulf (Moghadam, 2016).

Generally speaking, the Iranian state views members of the diaspora with suspicion and as a security issue. But this has not prevented many governments in the Islamic Republic from trying to establish links with Iranians abroad at more favorable political times, or from mobilizing, even exploiting, members of the diaspora for political and economic ends. For a country and a society that have been isolated and hit by a regime of international sanctions for over 40 years, Iranian diaspora and transnational networks have also enabled forms of openness to cultural and economic globalization, but these dynamics have never been framed by explicit Iranian state policies aiming, for example, to encourage the use of economic remittances for development purposes, as can be seen in many other countries in the Global South. In short, ambiguity and ambivalence have been the watchwords of the Islamic Republic's unstable diaspora policy for over 40 years.

Understanding the history and geography of the Gulf region and of the links between state and diaspora in the Iranian context is important because it allows us to grasp how the transnational can become a resource or conversely an obstacle for individuals

and groups, and how it can potentially become a locus for the formation of social remittances within and beyond a transnational community. These historical and conjunctural structures and resources constantly redefine the space of transnational practices and expose the individuals involved to the possibilities and constraints of that space. The latter are linked to the ways in which individuals are anchored and engaged in distinct social fields, their positioning in these fields, their ability to associate them and create links, and ultimately play a part in identity processes. It is the complexity of this combination of resources and constraints located at distinct scales that determines the quality, modes, scope and scale of transnational individual and collective practices, and hence also of the social remittances that can be formed and transmitted there.

The formation and circulation of ideas, values and practices between two or more territories therefore invites us to take an interest in the agents who are behind such projects, such as individuals or organizations, but also in the conditions under which they are carried out. It is for this reason I argue here that, when analyzing social remittances and attention paid to the individuals making these remittances, we must constantly take into consideration the 'pluri-dimensionality of human agency' and 'the plurality of structural embedding of agents' (Lacroix, 2014), locating them in the wider debate concerning the structures and agency of actors, strongly embedded in a given context. The spectrum that separates agency from structures is rooted and evolves in a given social and historical context, itself characterized by the multiplicity of social actors and the interlocking of different levels, from the individual to the community, or national frameworks to transnational dynamics. De Haas (2021) defines agency as 'the limited—but real—ability of human beings (or social groups) to make independent choices and to impose these on the world and, hence, to alter the structures that shape and constrain people's opportunities or freedoms' (p. 14). I would probably replace in this definition 'independent choices' by 'interdependent choices' to emphasize the relational dimension of agency and the way that individuals—while often aware of the limits of their own

actions and their dependence on other actors—try to direct them towards their own aspirations, goals and dreams.

In this chapter, I propose to frame the understanding of social remittances through the analysis of individuals' involvement in associative and cultural initiatives in the transnational context explained above. This enables me to jointly consider their aspirations and power-to-do with the structural constraints of the migratory and transnational contexts. As the French sociologist Emmanuel Ma Mung points out, migrants' initiatives express their capacity to mobilize resources to construct their migratory project and world, which combines their know-how and their power-to-do, and expresses their degree of agency. For Ma Mung (2009), agency is the combination of 'know-how defined as the capacity of a subject, individual or collective, to constitute and maintain a world' and 'power to do, as the capacity of this same subject to act on and transform this world' (p. 9). Considering the autonomy/structure dichotomy in migrants' actions and initiatives helps us therefore better understand, on the one hand, the conditions for their realization and, on the other, evaluate and analyze the effects that they may or may not have on the social, cultural and political organization of the societies in question. It is in this way that they can be considered social remittances.

Transnational charity networks: Economic remittances and emerging social dynamics

In Evaz, a southern Iranian city, two universities were built thanks to two prominent Dubai figures with roots in the region. The first one remains one of the largest projects funded by Dubai donors. It was inaugurated in 1996 with a capacity of 75 students. It now welcomes more than 700 students each year, and more than 3,500 students are active on a 12-hectare site consisting of several buildings and two dormitories for girls and boys. The budget required for the first phase of construction was about 7 billion tomans (2,800,000 euros at the time of construction), half of which was financed by a single person: a Dubai businessman originally from Evaz. The rest of the funding was provided by various donors. The second university was inaugurated in 2008.

In 2011, this university had a capacity of 240 students, and classes were taught in an old school building while waiting for the construction of a new building to be completed. As the director of the university explained: 'It is the donors who, with their funds, made it possible to build the buildings, the current examination rooms and the library. But now we run the university autonomously by collecting tuition fees.'[1] The main donor of this university was a Dubai-based Iranian who donated a large portion of the land he had inherited from his grandfather for the construction of this university.

In all cities of Larestan, one finds countless examples of urban facilities, mosques, orphanages, and universities being financed by people with roots in the region. The Iranian government even seems to encourage these initiatives, which sometimes exonerate it from its own responsibilities. What is important to note here is that private funds from Arab cities of the Gulf, particularly Dubai, have not only transformed the landscape of the southern Iranian regions, but also reshaped social relations between residents, local authorities and the central government. While they have allegedly contributed to the development of southern Iranian cities by facilitating the construction of urban facilities and mosques or the paving of streets, they also correspond to individual logics—that is, those of donors who, by investing funds in their country of origin, gain prestige and fame both in Iran and in the Larestani community of Dubai. As Adelkhah (2005) observes, 'While presenting itself as a form of solidarity, and while effectively building solidarity, the ethos of "good deeds" reflects and generates hierarchy, power, and, therefore, conflict—even if hushed—between the donor and recipients' (p. 355).

In Larestan, particular Dubai donors are often mentioned with great respect. This is the case, for example, of the president of a large company, although he is rumored to engage in corruption and money laundering. Thus, an interlocutor in Dubai who had contributed to the funding of the first university asked me not to visit the second university, which was funded by

[1] Interview conducted by the author in 2013.

another donor, on the grounds that the latter was an 'unnecessary imitation' of the former. Therefore, such selfless gifts sometimes generate competition and jealousy. In addition, the logic of charitable investments has not always taken into consideration the real needs of cities and villages in Iran. As one of my interlocutors observed when discussing these donors: 'They all want to go to heaven'—hence, a number of mosques that far exceeds the needs of Evaz and its 20,000 inhabitants. Moreover, the individuals involved in these charitable initiatives have come to realize that the mere fact of building a mosque no longer guarantees the social prestige of yesteryear, and that the 'paradise on Earth' for the 'man of God' can only be ensured if such funding truly improves the living conditions of the region's inhabitants. In fact, some of the facilities funded by these donors have been diverted from their primary purpose due to their excessive size and number: there are rumors that a particular orphanage has become a site of drug trafficking or that a particular mosque is empty all day long. These stories circulate across the Gulf and are the subject of debate and questioning among the Larestani community on both shores.

Cultural actors and the making of a transnational social field

In this transnational context, characterized by the significant circulation of capital in the form of economic remittances between the two Gulf shores, some individuals—involved more in cultural and social practices—have played an important role in the restructuring and adjustment of economic practices by initiating cultural activities directly or indirectly related to the already established transnational economic field. The notion of culture is used here first in the sense implied by the adjective 'cultural' and in relation to the way individuals have qualified their own practices, that is, cultural practices/actions or, in Persian, '*faaliyat hayee Farhangi*'. Second, I use the notion of culture, from the analytical point of view, as a social context: as Levitt (2016) puts it,

> Culture is context: the discourses, regimes and assumptions embedded in institutions, and the

> repertoires of meanings that are marshaled to respond to dilemmas and opportunities (Alexander and Smith, 2010). It makes certain actions possible by providing the building blocks with which to enact them, and by marking them as socially appropriate, while restricting others by rendering them unacceptable' (p. 144).

This understanding of culture as a constantly evolving assemblage, not a predetermined structure or reduced to mere 'cultural products', allows it to contribute to our understanding of diverse sociocultural fields and how the circulation of knowledge, techniques and representations participate in altering the repertoire of mobilized meanings, redefining social boundaries (re-bordering), and in how relationships between actors in a given field (for example the economic) evolve in relation to other fields (the cultural or artistic).

In her definition of culture and cultural circulation as social remittances, Levitt (2016, 2020) emphasizes the role of individuals as cultural project-bearers, and the need to take into account the analysis of their status and the scales of practice and mobility in which they engage that ultimately contribute to the emergence of new social spaces. These, as well as the status of what she calls 'vernaculizers', are also influenced by institutional arrangements and normative regimes as well as how different geographies of social and cultural practices relate or do not relate. This focus on individuals as mediators or vernaculizers invites us to consider their positionality, the communicative boundaries of their practices and the repertoires of meaning they mobilize through cultural and social practices to be understood and accepted by other actors (Levitt, 2020).

In the following section, I will discuss two figures from the Iranian community in Dubai whose activities fall within the cultural and artistic field: an actor and a poet, both from southern Iran. Their careers and involvement in cultural initiatives are interesting in several respects. Not only is their work inspired by the transnational context between southern Iran and the city of Dubai, but they also use their work—and therefore ideas, and

their status as artistic and cultural figures in this transnational social space—in the development of social and economic practices that concern the transnational community between the two shores, such as charitable practices. The ideas that make up their work thus also become social remittances that participate in the socioeconomic dynamics of their region of origin.

It is important to remember again the context of sectarian politics in Iran, as in the Arab countries, which have marked the nation-state building processes in this region as well as the collective memory of the inhabitants and the relations they maintain with the state authorities. The city of Evaz in Iran, discussed in this chapter, is a Sunni-majority city; its inhabitants therefore have ambiguous and sometimes conflicting relations with the Iranian authorities. The religious and ethnic minorities of these territories have been marginalized, or at least the feeling of having been marginalized is still very present among their inhabitants. In this context, the issue of mediation between the Iranian authorities and these communities is very important, and highlights the role certain individuals can play in creating links between distinct and even opposing socioeconomic and cultural spheres.

Playing here, changing there

Ali Tizpa is a Dubai resident originally from Evaz and a theatre actor and director who wrote several plays, some of them in the Larestani dialect (from southern Iran), that were performed by a troupe he himself formed with young Larestani from Dubai. He left Iran in 1997 and is one of a number of recent migrants of Iranian nationality to Dubai. When he arrived in Dubai, he began by trading—importing shoes from Italy and China to the Emirates and Iran—but soon realized that 'even in Dubai, where everyone's priority is business,' he had to satisfy his passion for the theatre and his attachment to Larestani culture. He set up a small office, with two computer screens and a camera, on the premises of his shoe import company. When I visited, among the multicolored trainers from Italy and China were DVDs of his films and, between two phone calls in Larestani, Urdu, Arabic or Hindi, he was editing them.

He talked about his experiences as a migrant to Dubai:

> For the first few years, I worked like everyone else in business and commerce. Then, I decided to put together a troupe of artistes, in fact a theatre company. I thought that, with all the Larestani there are in Dubai, it was necessary to create a structure because I could see that the language was being lost, our culture was being lost because, you see, children go to school and they learn either Arabic or English and so, if there isn't an effort to safeguard the language, it's lost. I thought theatre was a good way of doing this, and it was also what I knew and had practiced in Iran before emigrating. So I said to myself, I'm going to create a theatre in the Larestani language! People were quite surprised and didn't really know what it was all about. The fact that I said it was for the Larestani attracted a lot of young people, even though 90 percent of them had no notion of theatre. There were young people of all kinds, from those who had just emigrated to those who had been born here but still spoke our dialect at home.

The choice of the southern Iranian dialect came as a surprise to some, who could not see any point in performing in a 'marginal' language. However, Tizpa cleverly decided not only to adopt the southern Iranian dialect, but also to evoke in his plays, themes relating to the migratory experiences of this community and their effects on the community in Dubai but also in southern Iran:

> The content of the plays tended to be social comedies, because we didn't want to impose too heavy a burden on our audience, as they weren't used to the theatre. There were people who said they had never even been to the cinema but who came to the theatre. What's more, I wanted this work to be about our own lives. In other words, I would gradually write sketches of a story and then we would work on it until it matured. We interacted with the people who live here, so the

> final writing had the same humor as the local people; it spoke to them. It was very good and we did plays over several years until we created the Larestani festival of arts and culture, which brought together musicians, poets and us who worked in theatre.
>
> You know, naturalized Emirati Iranians are sometimes ashamed to speak our dialect. There are also some Larestani who hide their origins by saying they are Emiratis. Personally, I think everyone's roots are important and we need to put in place ways of ensuring that people are not ashamed to say who they are. When we organized the Larestani arts festival, when people left the hall, I could see their pride in being Larestani on their faces. On the other hand, there are also Larestani in Iran who are ashamed to say they come from small towns, so they say they're from Shiraz, for example, which is a big city. But you have to accept yourself if you want to move forward! You'll say I'm just spouting slogans [burst of laughter]! In any case, that's why I tell myself that, with this kind of practice, I can maintain a cultural bridge.[2]

One of Tizpa's plays tells the story of a grandmother from Evaz who has received a significant amount of money from a relative in Dubai. She dreams of building a mosque for the residents of her city, partly to secure a place in Paradise. But she quickly realizes that the mosques are empty and that this is no longer of much use. She then decides to build a hospital, but realizes there is one already and no need for another. She then thinks of building an orphanage, but remembers the stories of delinquents who gather in orphanages. The play revolves around the confusion experienced by the grandmother, who became rich overnight and no longer knows what to do with her money. When Tizpa staged his play in front of an audience of donors in Dubai, he held up an unflattering mirror to them.

[2] Interviews conducted by the author in 2011 and 2021.

Tizpa has also tried to persuade a few benefactors to fund his cultural projects, with limited success. His stay in Dubai and the experience of living as a migrant in that city enabled Tizpa to become more aware of the position of this minority group in Iran, but also to seize the transnational as an opportunity to make a marginalized population and culture in Iran more visible through his personal passion for film and theatre. His reflections on his own origins and on the transnational situation is expressed through his theatrical creations, but it is also rooted in sociopolitical transformations in both national contexts: on the one hand, the rise of Emirati nationalism and the effects of Emirati policies to homogenize the heterogeneous origins of Emiratis and, on the other, the marginalization of minorities in Iran. These historical and structural constraints have not, however, prevented him from mobilizing various resources from within the community of the great Larestani merchants as well as from the Iranian state authorities—as a legal Iranian citizen—to carry out his artistic projects, the content of which questions and even calls into question the social and economic organization of his own community, for example, through the criticism he has levelled at works of charity on both sides of the Gulf.

Hazardous and unsteady transnational mediation

The other influential figure in the transnational field between southern Iran and Dubai is Silvana Salmanpour, a poet from the Larestan region of southern Iran, who has been living in Dubai for over 30 years. She is one of the best-known personalities of the Iranian community in Dubai, especially among the Larestani and, through her literary activities and involvement in various social circles, has made herself widely known in different milieus. Participating in the charity networks operating between Dubai and southern Iran, in particular for collecting and sending funds from Dubai to the city of Evaz, Salmanpour has actively participated in structuring these charitable practices in relation to both the Iranian community from southern Iran in Dubai and the Iranian authorities in Iran, so that funds are allocated to collective development projects. Salmanpour played a remarkable role in institutionalizing

these practices, which has allowed her to be acknowledged by her community of origin and become a reference for the Iranian authorities in the Emirates and in Iran. She explains:

> On these occasions [benefactors' ceremonies to collect money], I often make a speech and recite quite patriotic poems related to our homeland to motivate people to participate! The board of directors, based in Evaz, comes to Dubai on this occasion and expresses its financial needs. We examine the requests and make a financial assessment of the requests and then, during the steering committee meeting, we submit the needs and present the results of the money collection according to the priorities, and dedicate a part of the money to a particular action.[3]

Although originally from Evaz, Salmanpour's path to the Emirates began with her travels around Iran's major cities. With a passion for literature and theatre, she passed the entrance exam to Tehran University before the 1979 revolution and settled in the capital, Tehran. On the eve of the Islamic Revolution, Salmanpour took part in the effervescence of civil society and continued her literary activities in the many circles and meetings held in the capital. During the Islamic Revolution, followed by the 'Cultural Revolution',[4] Salmanpour distanced herself from certain political groups, left the capital, got married and finally decided to leave Iran in the midst of the revolutionary chaos and for fear of Iraqi bombing raids on the city of Shiraz.

After arriving in Dubai in 1987, she took part in the emergence of the new city-state, which underwent spectacular development in the early 1990s. Salmanpour's family had had long-standing relations with the Emirates before the country's independence in 1971, but owing to her father's return to Iran and the cancellation of the papers he held, they were never able to obtain Emirati

[3] Interview conducted by the author in 2011.

[4] A series of events between 1981 and 1984 that led to the closure of Iranian universities or, according to the revolutionaries, to 'purification' procedures for 'Westernized' students and professors with a view to their Islamization.

nationality. Thus, like all 'temporary workers'—as migrants are called in the Emirates—she is faced with the precarious situation of an immigrant to the Emirates. She spoke very little Arabic and just enough English to interact with colleagues, so she preferred to work with other migrants from her home region of Larestan. Until then, Salmanpour had shown little interest in the cultural and artistic expressions of her native region, as she was interested primarily in all the modernist movements in the capital of Tehran. Recognition by her community of origin and the importance of the Larestani presence in Dubai prompted her to take greater interest in it, from a literary point of view, to the point of writing poems in the Larestani dialect, which were lauded by the Larestani community in Dubai. Some were directly translated into Arabic by an Emirati poet for the Emirati public.

The circulation of Salmanpour's work between Iran and the Emirates has contributed to this recognition among Iranians in Dubai, in her community in southern Iran and elsewhere in Iran. It has not been easy: because of restrictions in the Emirates on publications in foreign languages (apart from Arabic and English), all Salmanpour's books have been published in Iran (except for her Persian translation of an Emirati poet's book, which was published in Dubai) and distributed from Iran in Iranian cities and, to a lesser extent, in the Emirates. It was by means of dhows crossing the Gulf and passengers on regular flights between southern Iran and the city of Dubai that she managed to transport some of the books published in Iran to Dubai, where she also had to contend with customs and Emirati regulations on book distribution.

Through her experiences as a mediator and vernacular speaker, Salmanpour has acquired a symbolic capital that gives her not only the status of a transnational poet, but also that of a public figure who regularly intervenes in Iranian political life, notably through her writings, poems and interventions on social media such as Instagram. Through these poems with political content, or by regularly sending letters to the elected representative of the department of Larestan in the Iranian parliament to raise the social and economic problems of the country's southern regions,

Salmanpour is still today a de facto representative, but at a distance from the people of her region of origin, who ties together the economic, political and literary spheres.

These forms of mediation are constantly impacted by changes in the political situation in Iran, in the geopolitics of the region and indeed in interstate relations between Iran and the Emirates. Periods marked by democratic dynamics in Iran and improved relations with the rest of the world, such as the reform period following the election of President Khatami (1997–2005), have enabled Salmanpour's personal and collective ambitions to be aligned with the desire of Iran's diplomatic authorities to improve relations with members of the Iranian diaspora, including in Dubai. During favorable political periods, several meetings were held at the Iranian club in Dubai, which belongs to the Organization of the Disinherited, a revolutionary parastatal organization that represents the hardline of the Iranian regime. Setting up charitable and cultural activities in this context has always required lengthy negotiations with the Iranian authorities over the form and content of the events organized, such as the Iranian authorities' determination to make it compulsory for female participants to wear the hijab at the Iranian club in Dubai.

Despite these difficulties, Iranians, including those from ethnic and religious minorities in Iran, have managed to organize a number of events at this venue, and personalities such as Salmanpour have played an important role in this mediation. In contrast, during periods of political tension in Iran, such as the demonstrations by the Green Movement in 2009 and the election of President Ahmadinejad (2005–13), activities at the Iranian club came to a complete halt for many years, not only because of Ahmadinejad's conservative policies, but also because the club increasingly lost its legitimacy among the Iranian population of Dubai, who no longer wanted to go there, especially as Ahmadinejad had visited the club two years earlier during his visit to the Emirates and made remarks that had offended public opinion in the country.

Regional rivalries and geopolitical tensions have also increased the Emirates' security focus on the Iranian presence in Dubai, which has been a major factor in some Iranians' decision to no longer attend Iranian state-owned institutions or become involved in transnational activities between the two shores.

An off-shore political arena at the crossroads of various fields

Growing awareness and criticisms leveled at unorganized charitable initiatives, as illustrated by the reflexivity of members of the community, appear to have borne fruit in recent years. There is a growing trend towards the creation of donors' associations with formal institutional functioning, in which the board of directors examines projects together with public and private partners from Iran. Moreover, these associations of Dubai-based donors provide opportunities for sociability and encounters between people originating from the same city or region in Iran. At major annual gatherings, members of these associations gladly recite poems in the Larestani language and/or rekindle patriotic feelings towards their hometown, and even towards Iran. This institutionalization of the activities of networks of donors, which is very favorably received by inhabitants and city officials in Iran, goes hand in hand with the active but remote participation of Dubai-based Larestani in Iranian political life. A transnational political field is thus being formed in which Iranian residents of Dubai actively participate. Given the economic and social weight of these residents, the large majority of whom hold Iranian passports and can therefore participate in Iranian elections, candidates running in the electoral districts of Larestani cities during parliamentary elections travel willingly to Dubai to meet them.

Thus, in Dubai and in the UAE, donors, Iranian residents of Dubai, political leaders, poets and actors are active members of a political scene that is de-territorialized and re-territorialized beyond Iranian borders and whose practices can sometimes be described as democratic. In this transnational political and social field, businesspersons manage to build an image of reliability

among the Larestani of Dubai, while strengthening the reputation they have acquired in their hometown. This reputation in turn helps strengthen their influence in Dubai's business community. Thanks to the support provided by this community, other Iranian migrants join the charitable initiatives and, as we have seen, the expectation of effectiveness requires that these initiatives be organized in increasingly institutionalized forms. Such actions contribute to public policies aimed at improving living conditions as well as to development projects that must be organized by the state. Consequently, while private funds in the form of charitable initiatives reinforce the sense of autonomy from the state, Iranian migrants in Dubai and residents of Iran together partake in the Iranian political field.

Conclusion

In this chapter, I have attempted to illustrate how the combined study of the migratory and cultural trajectories of certain individuals sheds light on the agency of migratory and diasporic spaces, which sometimes challenges the hierarchies of the country of origin and leads to a redefinition of center-periphery relations. Looking at these transnational connections at the regional and subnational scales is important because it helps us address broader issues, such as those concerning the relationship between the state and diasporic social spaces, and avoid methodological nationalism, both in relation to our understanding of the countries of origin as well as diasporic and transnational communities.

At this level, the analysis of the circulation of ideas, practices and values between several territories requires us to take into account the life-stories and migratory trajectories of actors involved, their ability to navigate and combine several fields of economic and cultural practice, sometimes to reconcile personal passions and dreams with political and economic imperatives, to confront the conjunctural and historical constraints of a transnational context and seize any opportunities it may offer. As stated by Lacroix (2014), actors' agency and individuality stems from the complexity of their situations and their ability to

negotiate between different social positions. Social agents 'are immersed in their multiple structural embeddings, and are thus to cope with an array of expectations and obligations. It requires a great deal of courage, diplomacy, compromise, or submission to articulate a coherent identity' (p. 657).

Finally, culture as a social space interacts with other spheres, such as the political and economic spheres, modifies and is modified by them. And the imbrication of the cultural, economic and political spheres in a transnational context offers a propitious observatory for questioning and evaluating the social remittances. This is why we need to consider social remittances as a mediated process across several fields, where the role of vernaculizers and mediators becomes crucial. But transnational mediation, as a means of social remittance, is contingent on the socio-spatial configuration of the diasporic society, domestic politics (here in Iran), the migration policies and politics of the host countries as well as the geopolitical environment. These multiple configurations evolve over time and underline the multiscalar nature of transnational social spaces and actors, positioning themselves in distinct ways vis-à-vis the situation of the country and region of the origin. The relationship of Iranians in Dubai with Iran, formed on the one hand in the non-integrative political environment of the host country, the UAE, and on the other hand anchored in the so-called periphery of Iran, explains the strong transnational interdependence with the country of origin. Without exceptionalizing a region, I would like to conclude that the analysis of social remittances—as part of and constitutive of broader processes of diaspora formation, state building and social change—needs to be embedded within a longue durée approach that looks at the geography of mobility and migration between cities of a given cultural area, anchored in imaginaries and hierarchies specific to a region, which are permanently subject to transformation and contestation.

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Chapter 7

Social remittances and social change: The case of Egypt

Ayman Zohry

Introduction

Migration from Egypt started in the late 1960s, mainly for economic reasons but also for political ones, with the large majority of migrants going to the Gulf states. As early as the 1970s, the Egyptian state came to regard emigration as a means of easing pressure on the country's labor market. From the 1980s onward, migration has been regarded as a tool of development. The state has further eased migration procedures to increase the remittances necessary to supply payment deficits—a strategy that has proven successful. Indeed, remittances are among Egypt's largest sources of foreign currency.

Remittances have long been the focus of studies dealing with the relationship between migration and development, both theoretical and empirical. Such flows of wealth are important not only for the sending country, but also to the families of migrants (Caldwell, 1969). Egypt is one of the top ten recipient countries of remittances worldwide and the top Arab country in terms of expatriate remittances, estimated at about USD30 billion annually (KNOMAD, 2023).

Migrants remit money, goods and commodities, as well as ideas and behaviors that may affect the sending countries positively or negatively. Levitt calls such remittances 'social remittances', defining them as 'the ideas, behaviors, identities,

and social capital that flow from receiving to sending communities' (1998, p. 927). She identifies three types of social remittances: (a) normative structures (ideas, values and beliefs); (b) systems of practice (actions shaped by normative structures); and (c) social capital. This chapter aims to explore nonmonetary remittances and assesses their impact on Egypt.

Egyptians abroad

There are different estimates for the number of Egyptians abroad. While national estimates push the number of overseas Egyptians up to 10.6 million, the United Nations Department of Economic and Social Affairs (n.d.) reduces this number to 3.6 million in 2020. My own estimate of the overseas Egyptian population is about 9 million. The bulk of Egyptian migration comprises labor migration to Arab countries, with more than 70 percent of such migrants based in Gulf countries and other Arab countries, including Saudi Arabia, Jordan, the United Arab Emirates, Kuwait and Qatar. Egyptians in non-Arab countries comprise less than 30 percent of all Egyptians abroad, with most such migrants settled in the US, Canada, Italy, France, Australia, Germany, and the UK.

Nonmonetary (sociocultural) remittances

One should not ignore the interaction between migration and globalization and the role that diaspora networks play in enhancing cross-border flows of goods, capital and knowledge (Rapoport, 2016). Globalization, made possible by new communication and information technologies and by increased mobility, has engendered new and different types of consumption patterns. In remote villages in the Nile Delta and Upper Egypt, an increasing number of television satellite dishes is apparent, bringing international channels to these households and influencing their behavior and perception of migration.

The Egyptian media, however, tends to stigmatize returnees from the Gulf countries as importers of consumerism and conservative religious and gender norms and a means of

spreading cultural values from abroad (Gruntz & Pagès-El-Karoui, 2013). Most Egyptian migrants to the Gulf countries are men who leave their families behind, in which case other family members assume their responsibilities, such as in agricultural work. In this context, their husband's absence forces a large proportion of women to manage their households alone, with a positive impact on women's empowerment (Brink, 1991; Zohry, 2002). In contrast, migration to the origin of Wahhabism in the Kingdom of Saudi Arabia, for example, has affected Egyptian society in other ways by reproducing a new version of social and religious behavior, increasing the tendency toward fundamentalism and marginalization of women in society.

The following sections explore the impact of migration on selected aspects of Egyptian society, including dress code, religious practice and the Gulfization of the public sphere.

The dress code and migration

The typical dress of Egyptian males in rural areas is the jellabiya—a traditional Egyptian garment. It differs from the Arabian thobe in that it has a wider cut, no collar (in some cases, no buttons) and longer, wider sleeves. In the case of farmers, these sleeves may be very wide. Jellabiya colors are often dark, with tan or striped fabric being used as well. The Egyptian jellabiya is made of locally manufactured cotton or linen, suited to the country's hot, humid weather.

With the extensive migration to the Gulf countries in the mid-1970s, however, Egyptians started to introduce the Khaliji (Arab Gulf) jellabiya to their country. The top of the Khaliji jellabiya resembles the classic Western shirt, with fitted sleeves and a collar. It is usually white and made primarily of polyester (usually 70 percent polyester and 30 percent cotton). It became common for returning migrants from the Gulf to carry Khaliji jellabiyas in their baggage, both for their own use and as gifts for relatives and friends.

Even though this type of dress was not suited to Egypt's weather, the use of the Khaliji jellabiya became almost universal, with both urban and rural males replacing their traditional dress

with the imported jellabiya. In addition, it replaced the Western pajama in urban areas and, for males, became their main dress at home. The most important motive for males to shift from the traditional Egyptian jellabiya to the Khaliji version was the latter's perceived connection with Islam. Not only is the color white associated with Islam, but many Muslims also tend to wear white when attending the Friday prayer. Additionally, this jellabiya originates in Saudi Arabia, the country in which the Muslim holy land is located. As a result, the Khaliji jellabiya—a cultural import—acquired a religious legacy and replaced the national jellabiya.

A second aspect of imported dress codes concerns women's clothing. Egyptian men who migrated to the Gulf countries in the mid-1970s and developed an association with the white jellabiya they observed there, also found that local women tended to wear black and remain fully veiled. Given that such migrants did not have close contact with local society in the Gulf, they perceived this dress as being 'standard' Muslim dress and began to import it to Egypt, in a sense completing a 'black-and-white' picture. This tendency was also associated with easing pressure on Islamic movements under Anwar El-Sadat after a long ban on such movements during the Gamal Abdel Nasser era. As a result, the black Bedouin robe began to replace traditional rural women's dress and eventually extended to all segments of society in Egypt.

It is important to mention here that the Bedouin robe replaced urban Egyptian women's Western style of dress not only for religious reasons, but also for economic ones. Bedouin robes are relatively uniform and can be worn and re-worn without the need to possess many such outfits—unlike Western clothes, which come in different styles and colors for different occasions, reflect high social status and compel wearers to maintain a larger number of outfits. Assessing the economic advantages of the hijab among Tanzanian undergraduate students, Malengo (2023) finds that wearing a hijab helps women reduce 'unnecessary' spending simply because their physical appearance becomes less visible.

Nowadays, nearly all women in Egypt (an estimated 90 percent of whom are Muslim) wear some form of veil. Some women prefer to wear a hijab, which covers only their head; others, a niqab, which covers the entire head and face, but leaves a slit to see through; few women appear in public unveiled ('Haughty about the hijab', 2015). Amin (2003) observes that virtually no female graduate students in the 1950s wore a hijab, in contrast to their peers at the turn of the twenty-first century, almost all of whom did. El-Feqi (2020) argues that the hijab is not just a garment for Egyptian Muslim women to express their religious convictions, but is also part of the social structure, through which it is possible to monitor the various changes and stages that Egyptian society has gone through in terms of political conditions, social transformations, intellectual fluctuations and cultural convictions.

Muslims, but not Islam

> I went to the West and saw Islam, but no Muslims; I returned to the East and saw Muslims, but not Islam.

Muhammad Abduh (1849–1905), an Egyptian jurist, religious scholar (the grand mufti of Egypt) and liberal reformer, regarded as the founder of Islamic modernism, concluded his visit to Europe with this quip, which is particularly appropriate to our discussion. Returning male migrants who had spent years in Saudi Arabia brought with them a strict code of Islamic practices, mixed with aspects of the harsh Bedouin culture, to Egypt's more tolerant agricultural society (Zohry, 2006). The result was an increase in Islamic practice and less tolerance. Moreover, many theological leaders embraced Wahabi thinking after migrating to Saudi Arabia. Their subsequent return to Egypt attracted a significant number of local followers as they established their own TV channels and began to spread their more conservative discourse widely. It is worth noting that this new generation of

theological leaders were not graduates of Al-Azhar University[1] and many did not even study Islam in specialized schools. In addition, they did not wear the formal dress associated with the university, but tended to dress similarly to Wahabi theologians in Saudi Arabia (Zohry, 2012).

As communication became more widespread and more innovative with the rise of new media, these theological leaders became celebrities in much the same way as film stars and football players. They amassed millions of social media followers on platforms such as Facebook and Twitter, and began to feature on desktop and mobile phone wallpaper and screensavers in place of other celebrities (even though many such theologians deny the legitimacy of photographing the human body). In addition, followers began to set quotations from their TV programs as ringtones. This excessive religious behavior had no impact on Egypt's socioeconomic development, however (Lotfy, 2005).

Such behavior also resulted in religious and sectarian strife, not only between Muslims and Christians who had been living together for hundreds of years, but also among Muslims themselves. Thus, divisions emerged along lines of sect or school of thought—Salafi (close to Wahabi), Sufi, Sunni (primarily associated with Al-Azhar), liberal and others. Indeed, after more than 200 years of the foundation of modern Egypt as a nation-state, there still Egyptians who dream of returning to an Islamic caliphate.

The Gulfization of the public sphere

Egypt has long been known as a wellspring of Arab art and culture. It has produced over 3,000 films in the last century, boasts an extensive body of literature and music, including works for radio and other media, is home to numerous world-renowned universities, and sends Egyptian teachers to other Arab countries.

[1] Founded in 970 AD, Al-Azhar is the world's most prestigious center of Islamic learning. It has a long tradition of teaching all four schools of Sunni Islamic jurisprudence (Hanafi, Maliki, Shafi and Hanbali). Al-Azhar is regarded as a representative of moderate Islamic thought.

As a result, it has contributed significantly to Egyptianizing the Arab cultural sphere. Egyptian idioms are widely understood and appreciated across the Arab region. However, migration to and return migration from the Arab Peninsula has begun to compete for space with traditional Egyptian culture, both in terms of art but also religious expression (Zohry, 2006).

The sharp sounds of Saudi Quran reciters have displaced traditional Egyptian Quran reciters such as Abdelbasset Abdessamad, Siddiq Al-Minshwai and Mohamed Refaat, while music television channels founded and paid for by Gulf businessmen have become a prominent feature of Egyptian media. Egyptian cuisine, too, has been affected, with Khaliji restaurants now an integral part of the food business in Cairo, while shopping malls stock Bedouin robes regularly. Until 2016, almost all bestselling books at the Cairo Book Fair were religious books from publishing houses in Saudi Arabia and their affiliates in Cairo. Many of these publications focused on strict Wahabi practices related to women and the use of the hijab and niqab. The books currently stocked by bookshops that specialize in Islamic books are usually cheaper than the cost of the materials used to produce them, which implies that they are subsidized, but not by the Egyptian government.

Conclusion

This chapter has attempted to illustrate the nonmonetary remittances of Egyptians abroad. Studies on the relationship between migration and development in Egypt tend to quantify this by focusing on economic aspects of remittances and their effects at the macroeconomic and microeconomic levels. While some studies have investigated the sociocultural effects of migration, there is considerable scope for further research in this area.

No social phenomenon can be attributed to a single influencing factor. Social change occurs over time and is usually influenced by multiple factors. Attributing social change in Egypt to the influence of return migration from the Gulf may need more

evidence to strengthen the argument. Until sufficient data becomes available in this area, however, it is possible to attribute this social change at least partly to the ideas that have permeated Egyptian society as a result of return migration from the Gulf, particularly with respect to the prevalence of the hijab among women and fundamental leanings of Wahabism.

While it is important to study the flow of monetary remittances, it is equally important to pay attention to sociocultural remittances, which can play a key role, negative or positive, in reshaping societies. This chapter concludes that financial remittances are usually associated with sociocultural remittances, but that, while financial remittances to Egypt have had a positive impact, the effect of sociocultural remittances has generally been negative.

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Chapter 8

Social remittances and social media: Evidence during Sri Lanka's socioeconomic and political crises

Bilesha Weeraratne

Introduction

Social remittances are the two-way flow of ideas, behaviors, identities and social capital between migrants' home and host countries. The concept of social remittances was initially framed by Levitt (1998) and subsequently theorized by many scholars, including Kapur (2010, 2014), Boccagni and Decimo (2013), and Chauvet and Mercier (2014) (cited in Lacroix et al., 2016). As Levitt (1998) observes, social remittances refer to a process of 'cultural diffusion' that takes place through cross-border migration. The wide spectrum of themes considered under social remittances vary from the transfer of knowledge, skills, innovations and social norms to preferences for justice, political emancipation, women's empowerment, the practice of democracy and the connection between foreign education opportunities enjoyed by students from developing countries. While individuals are the carriers of social remittances, the transfer itself takes place through in-person communication channels between migrants and nonmigrants as well as long-distance communication between the two. Additionally, nonmigrants with acquired social remittances can channel these to other nonmigrants.

The proliferation of social media has revolutionized long-distance communication by blurring the distinction between in-

person and remote communication. A simple definition of social media is the 'wide range of Internet-based and mobile services that allow users to participate in online exchanges, contribute user-created content, or join online communities' (Dewing, 2012, pp. 1–2). As such, improvements in access to, and the decline in the cost of Internet services, information and telecommunication connectivity and related devices have made social media globally popular. As the *Digital 2023: Global Overview Report* notes, by January 2023, there were an estimated 4.67 billion[1] active social media users globally, which accounts for nearly 60 percent of the world's population. At the same time, the estimated number of unique mobile phone users was 5.44 billion, while the number of Internet users was 5.16 billion. Over 95 percent of Internet users have visited chat rooms and used messaging apps or website and social networks; the most common social media platform worldwide was Facebook, with over 2.9 billion active users in January 2023 (Kemp, 2023). Other prominent social media platforms include YouTube, with 2.5 billion active users, and WhatsApp and Instagram, with 2 billion active users each.

Such widespread use of social media has made the transfer of social remittances instantaneous and as vivid—or even more so—as in-person exchanges due to its capacity to save, replay and share content, among other factors. As such, the use of social media has had a significant impact on the transfer of social remittances across countries. In Sri Lanka, there were 100.4 Internet connections per 100 persons in 2021 (Central Bank of Sri Lanka, 2022) and 8.2 million social media users in January 2022 (Kemp, 2022). Such connectivity, coupled with a high national literacy rate[2] at 93.3 percent and a national digital literacy[3] rate of 57.2 percent in 2021 (Sri Lanka Department of Census and Statistics, 2021), means that Sri Lanka is well placed to remain

[1] These may not necessarily be unique users as single users can have multiple accounts.
[2] Literacy rate of the population (aged 10 years or above).
[3] A person (aged 5–69 years) is considered digitally literate if they can use a computer, laptop, tablet or smartphone without assistance.

digitally connected with the rest of the world and to send and receive social remittances.

The most popular social media platforms in Sri Lanka include Facebook, WhatsApp, YouTube and Instagram. Kemp (2022) indicates that, in early 2022, there were 7.15 million Facebook users in Sri Lanka, which accounted for 41.5 percent of the over-13 population eligible to use Facebook in accordance with the company's rules. Similarly, Sri Lanka had 6.68 million YouTube users and 1.55 million Instagram users in in early 2022.

Along with financial remittances, social remittances have played an important role in Sri Lanka in recent years. The contribution of financial remittances in Sri Lanka is well established. Prior to the Covid-19 pandemic, financial remittances received averaged at USD7 billion per year, accounting for approximately 8 percent of GDP and 80 percent of the trade deficit. However, evidence of the contribution or significance of social remittances is limited. To address this gap in the literature, this chapter aims to look at how social remittances have influenced Sri Lanka, by focusing on the transfer of such remittances during the ongoing economic, social and political crises in the country. Migrants engage widely in Sri Lanka's economic, social and political life through social media platforms and interact with nonmigrants through the various forms of responses inherent in social media. As such, the use of social media has heavily shaped the landscape for social remittances to Sri Lanka during the crisis.

Based on primary data collected through an online survey carried out in 2022, this chapter provides initial empirical evidence of how social media shaped the transfer of social remittances to Sri Lanka during the socioeconomic and political crises. In doing so, it adds to the emerging body of literature on social media and is one of the first studies to examine the role of social media in social remittances. Its findings provide valuable empirical evidence that could enable Sri Lanka to harness the potential of the nexus between social remittances and social media with a view to strengthening social, economic and political development. In this

context, the chapter asks what salient patterns emerge in the transfer of social remittances through social media and how social remittances contribute during a crisis.

The literature review in the next section is presented under the themes of social remittances, social media and the use of social media by migrants. This is followed by a contextual background to the crisis in Sri Lanka. The subsequent sections outline the analytical approach, data and methodology used, followed by an analysis of the data and a summary of findings.

Literature review

Social remittances

Peggy Levitt uses the concept of transnational studies of migration to conceptualize the study of social remittances. As such, this approach to migration studies 'reveals the many layers and sites that make up the social spaces that they (migrants) occupy' (Levitt, 2005, p. 1). She defines at least three categories of social remittances: (i) normative structures, (ii) systems of practice, and (iii) social capital.

Normative structures include social norms that define relationships, belief systems, community participation, gender roles, perception of familial bonds and responsibilities, gender, race and civic culture while forming one's awareness of identity and class. Systems of practice are the resulting actions shaped by normative structures. These include an individual's participation within the family, social groups and society at large. The impacts of norms can be traced to an individual's social circles, religious and political belief systems, goal setting, networking and even in character traits such as their capacity to strategize and play the role of a leader within organizational spheres. Social capital refers to the status that social and political figures can sometimes acquire in their country of destination to advance a cause in their homeland. This status can have both positive and negative impacts on nonmigrant families back 'home'. Levitt further notes that the diffusion of social remittances is traceable because they

are spread intentionally and systematically. Most importantly, the direct communication of social traits adds a personal touch, enabling us to differentiate between social remittances and 'the faceless, mass-produced nature of global cultural diffusion' (Levitt, 2005, p. 3).

Mazzucato (2010) establishes that social remittances are part of reciprocal social relations. As such, the literature on social remittances uses the term 'reverse remittances' to emphasize the flow of social remittances from a migrant's country of origin to their country of destination (see also Levitt, 2016). In addition to forward and reverse social remittances, Levitt (2016) observes that 'iterative circulatory exchange takes place' when migrants visit or relocate to their country of origin and when nonmigrants visit migrants in countries of destination, as well as through various forms of exchange of ideas by way of letters, blog posts and telephone calls, to name a few. This concept of bidirectional social remittances as well as their vehicles of transfer sit well with modern forms of communication—namely, social media—used to transfer social remittances.

Social media

As noted, there are various definitions of social media that highlight its specific features. For instance, Kaplan and Haenlein (2010, p. 61) note that social media is an Internet-based form of interaction that allows 'the creation and exchange of user generated content'. Manning (2014, pp. 1158–1162) highlights interactive participation on social media and notes that 'social networking sites such as Facebook may allow passive viewing of what others are posting' but that, 'at bare minimum, a profile must be created that allows for the beginning of the potential for interaction'. The creation of profiles is identified as a key aspect that sets social media apart from its traditional counterpart.

A second aspect of social media, according to Manning (2014), is its capacity for being interactive. Paniagua and Korzynski (2020) note that the phrase 'social media' is an evolving concept that is often interchanged with related concepts such as user-

generated content and builds on diverse 'technologies including blogs, web pages, networking sites, and forums' that facilitate interaction and communication among users. Based on the type of activity users perform, social media is classified into 'social networking sites, blogs, content generating and sharing sites and user appraisal sites' (Baruah, 2012). Moreover, social media sites are not expensive and often do not charge user fees (Whiting & Williams, 2013). These characteristics likely contribute to their high popularity and rapid proliferation.

Social media is used for various reasons not limited to social interaction: finding or sharing information, passing time, expressing an opinion and surveilling or watching others as well as for entertainment, relaxation, utility and convenience (Whiting & Williams, 2013, p. 368). These features allowed users of social media to stay connected when physical social distancing was crucial during the Covid-19 pandemic. Additionally, during the pandemic, social media helped users 'access, share, post, and gain medical information' on infection outbreaks (Saud et al., 2020, p. 1).

Migrants and social media

The literature shows that social media is a crucial tool for migrants. After departure, they often rely on social media to stay in touch with friends and family back home as well as to assimilate in their destination country by establishing new connections, identify economic opportunities, network, access helpful information and organize themselves for charitable activities for their hometowns (Akakpo & Bopkin, 2021). Le-Phuong et al. (2022) show that social media serves as a means of maintaining strong ties among migrants and nonmigrants for many years after migrating, creating a feeling of intimacy and proximity when communicating with others thousands of miles away.

Merisalo and Jauhiainen (2021) note that 83 percent of all asylum seekers in their sample from Greece, Italy, Turkey and Jordan used at least one social media platform. The authors show that, despite the high use of social media among migrants, there are

geographic variations by region and country of origin as well as by demographic characteristics. Their findings indicate that, among those seeking refuge who are over 50 years old, the most popular social media apps are WhatsApp and Facebook, while among those under 30, apps such as Viber, YouTube and Instagram are popular. Their study also finds that the likelihood of utilizing social media is inversely related to migrants' age. They find a positive correlation between the likelihood of social media use and the likelihood of an urban upbringing as well as schooling.

The choice of social media platforms used by migrants is based on their particular information requirements and familiarity (Dekker et al., 2018). Le-Phuong et al. (2022) observe that Vietnamese female migrants use different social media platforms with a range of frequencies and diverse goals, while the choice of platform is location-specific. For instance, those in Vietnam tend to use Zalo (a local version of Facebook), while those in Taiwan use LINE, a popular Taiwanese social networking app. Vietnamese female migrants also use social media to express opinions and sentiments about perceived injustices or opportunities to a wider public. The authors show that migrants resort to social media during their pre-departure, in-service, and return and reintegration periods for assistance or information concerning each stage of migration.

Background in Sri Lanka

The social, economic and political situation in Sri Lanka began to deteriorate from 2020 onward. By the time the Covid-19 pandemic hit in early 2020, the country's economic situation was already dire—foreign debt stood at 39 percent of GDP, while the trade deficit and fiscal deficit were 9.5 and 9.6 percent of GDP, respectively (Central Bank of Sri Lanka, 2021). The disruption to local and global economies due to the pandemic deepened the economic crisis in Sri Lanka, leading to lower export earnings, higher public expenditure on health, the return and reintegration of migrants, halted departures for foreign employment, and

challenges to remittances[4] and social safety nets. By May 2022, Sri Lanka's foreign reserves had dwindled to USD50 million (Srinivasan, 2022). The dearth of foreign reserves created shortages of fuel, cooking gas, electricity, medicine and food. These occurred amid rising inflation and high levels of unemployment triggered by the lockdowns introduced during the pandemic. The ensuing social unrest led citizens to demand a change in political leadership.

From 2022 onward, there were widespread protests against the political leadership, fueled by rapid communication through social media (Kuruwita, 2022). Hashtags such as #GGG, #EconomicCrisisLK and #GogoHome trended on social media ('Sri Lanka Economic Crisis', 2022). Eventually, Prime Minister Mahinda Rajapaksha stepped down on 9 May (Fraser, 2022), followed by President Gotabhaya Rajapaksha on 14 July 2022. A new prime minister, Ranil Wickramasinghe, was appointed, who was subsequently elected president by members of the parliament ('Sri Lanka Political Dynasty Ends', 2022).

By this time, social media had gained traction in influencing people's perceptions in Sri Lanka. During the Covid-19 pandemic, social media played a vital role by disseminating risk information and updates to users (Jayathilaka et al., 2021). Similarly, during the subsequent economic crisis, people relied on social media groups, such as on Facebook, WhatsApp and Twitter, to offer mutual assistance as shops ran out of necessities, fuel and medicines. Attanayake (2022) notes that, 'Sri Lankans are generally not comfortable asking for help. But being on social media allows people to behave differently, as there is no in-person interaction, but only through a profile'.

In a similar vein, during the pandemic, social media offered virtual marketplaces for many goods and services, connecting individual buyers to both large- and small-scale sellers. As Hewage and Weerasekera (2020, p. 1) underscore, there is 'anecdotal evidence of home-cooks, bakers, designers, event service providers, and other entrepreneurs successfully

[4] However, remittances experienced growth in 2020.

leveraging social media as their primary platform for commerce'. At the same time, consumers often depend on the information available on social media to learn of others' experiences of a product, find other relevant information and review their options prior to making a product decision (Madhuhansi, 2019). As such, social media platforms play an important role as enablers of business activity (Hewage & Weerasekera, 2020).

Such rapid growth of social media use is indicative of its importance and its integration into people's daily lives. Social media platforms have played a significant role in the political sphere in Sri Lanka (Wijekoon, 2017). At the same time, there were many instances in which social media was blocked as a way of curbing the spread of alleged misinformation or to stop collective action. For instance, on 3 April 2022, social media was blocked overnight to deter Sri Lankans from organizing a planned protest against the foreign exchange crisis, which had led to power, fuel, medicine and food shortages; the use of Facebook, Messenger, YouTube, WhatsApp, Viber, Twitter, IMO, Instagram, Telegram, Snapchat, and TikTok was restricted ('Sri Lanka Blocks Social Media', 2022).

Moreover, many regulations were imposed to curb the use of social media in various circumstances during the economic crisis. For instance, in a statement issued on 8 June 2021, the Sri Lankan police warned that 'anyone creating, publishing, sharing, forwarding, or aiding and abetting the spread of "fake news" on social media will be considered to have committed an offence under provisions in the police ordinance, the penal code, the prevention of terrorism act (PTA), the computer crimes act and other laws' ('Sri Lankans Posting Information', 2021). As such, social media played a key role in influencing social interaction and perceptions during the recent social, political and economic crises in Sri Lanka.

Approach, data and methodology

This chapter approaches the nexus between social media and social remittances by considering the act of sharing own content via social media as an indication of the act of sending social

remittances via social media, while the act of reading others' content on social media is considered an act of receiving social remittances via social media. The analysis also acknowledges that sending and receiving social remittances, especially through social media, are not two distinct acts but overlap considerably, given social media users' ability to interact with each other.

Specifically, posting on social media means that the post is likely to be read, eliciting comments and reactions from others towards the content. Reading a post on social media means that the user is likely to create own content by commenting and reacting to others' content. This rich environment for sending and receiving social remittances makes social media an interesting setting to research. As such, this analysis of social remittances—based on flows of social remittances via social media—views social remittance flows as bidirectional. Those overseas (in Sri Lanka) may be sending social remittances to Sri Lanka (overseas) as well as receiving social remittances from Sri Lanka (overseas). The receipt of information across countries, which influences one's attitude, actions and opinions, is considered a social remittance.

This study is based on data collected from 157 respondents through an online survey (carried out from August to December 2022) of Sri Lankans either living in Sri Lanka at the time or abroad, who maintained regular[5] contact with their friends and relatives overseas or in Sri Lanka, respectively. Initially, the survey link was shared widely with known contacts and subsequently shared by their contacts as a means of snowball sampling. Among those who received the survey link, 202 self-selected into responding, while 45 were excluded based on the survey's screening criteria[6] (one was not a Sri Lankan national and

[5] Regular contact was defined as contact at least once a week via phone call, text message, chat or email, etc.

[6] Screening Question 1: Are you of Sri Lankan origin? Those who answered 'No' were not eligible to continue the survey.

another 44 did not have regular contact with friends and relatives across countries). Among the 157 who continued the survey, 97 were Sri Lankans living in Sri Lanka while 60 resided overseas.

Due to such snowballing and self-selection, the sample is not representative of Sri Lankans overseas or in Sri Lanka. Nevertheless, given the dearth of data and research in this area, the data collected in this manner serves the purpose of providing scoping evidence of the use of social media for social remittances in the context of Sri Lanka. I adopt a descriptive analysis approach to understand the characteristics of social remittance senders and receivers of Sri Lankan origin and the impact of social remittances on their views during the country's socioeconomic and political crisis. Similarly, descriptive analysis is used to understand the nexus between the use of social media and transfer of social remittances.

In this sample of Sri Lankans living in Sri Lanka and abroad, the average age was 38 years, with a standard deviation of 13 years. Among those who responded on gender, there was a near-equal split between male and female respondents at 52 and 47 percent, respectively, with 1 percent choosing not to indicate their gender. The majority were married (55 percent), followed by 40 percent who are single. The sample consists of relatively educated respondents: no respondent's education level was below the tenth grade and relatively small shares had passed only their tenth-grade examination (GCE O level) or studied only up to the twelfth grade (only 8 percent). Nearly three quarters of the sample had completed a graduate degree or some university classes or an undergraduate degree. As such, the findings may not be

Screening Question 2: Where are you currently located? The options were 'In Sri Lanka' or 'Overseas'. Depending on the answer to this question, respondents answered the module applicable to those living in Sri Lanka or living overseas.
Screening Question 3 for those living in Sri Lanka: Do you have regular contact (at least once a week) via phone call, message, chat, email, etc., with friends and/or relatives abroad? Those who answered 'No' were not eligible to continue the survey.
Screening Question 3 for those living overseas: Do you have regular contact (at least once a week) via phone call, message, chat, email, etc., with friends and/or relatives in Sri Lanka? Those who answered 'No' were not eligible to continue the survey.

applicable to the average Sri Lankan living in the country or abroad. Among various social media apps, the most used in this sample was WhatsApp at 68 percent (Table 1).

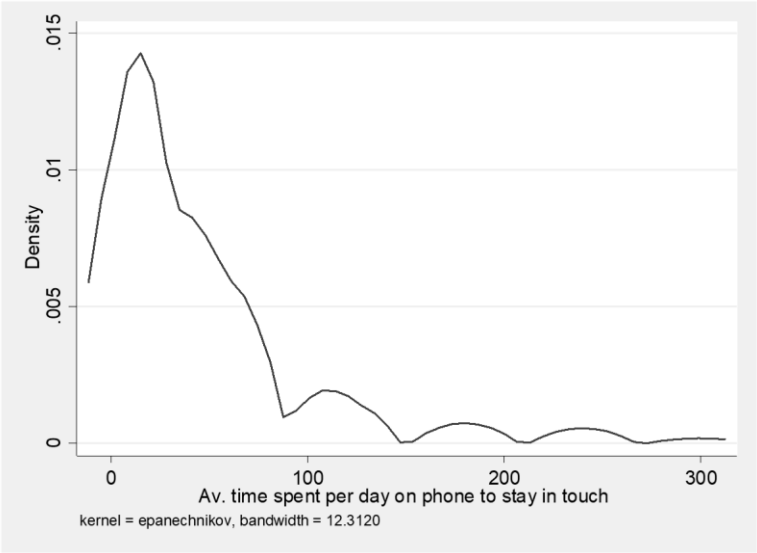
Table 1: Selected descriptive statistics

Variable	Descriptive statistic
Age and gender	
Mean age (years)	37.62
Standard deviation	(13.53)
	% of sample
Male	46.50
Female	52.23
Prefer not to say	1.27
Education	
Passed GCE (O levels)	3.82
Completed Grade 12	4.46
Passed GCE (A levels)	10.19
Some university classes	10.83
Completed vocational training	8.92
Completed undergraduate degree	13.38
Completed graduate degree	43.31
Completed doctoral degree	5.10
Marital status	
Single	40.13
Married	55.41
Widowed	1.27
Divorced	3.18
Most used social media apps	
Facebook (Messenger)	15.29
WhatsApp	68.15
Viber	0.64
Skype	1.27
Imo	1.27
Instagram	7.64
Twitter	1.91
Other	3.82

Source: Author's estimates, based on online survey data.

The range of time spent per day staying in touch (phone calls, text messages, etc.) with friends and relatives abroad was 1–300 minutes (excluding extreme values),[7] with an average of 44 minutes and a standard deviation of 54 minutes (Figure 1).

Figure 1: Distribution of average time spent per day staying in touch with friends and relatives overseas (in minutes)



Source: Author's estimates, based on online survey data.

Analysis

Patterns and characteristics

On average, respondents called nearly three friends or relatives daily and texted four daily (Table 2). When extreme values are disregarded, they called nearly four friends or relatives per day and texted over six per week. In this sample, only five

[7] Nine respondents reported less than one minute and one respondent reported 7,200 minutes. Considering these are respondents who did not understand the question, their responses were disregarded in this statistic.

respondents had a spouse outside the country while 47 and 30 had a parent or parent in-law in the country, respectively. Among the respondents, 74 had a sibling outside their country of residence while 30 had a child outside their country of residence.

As observed in the literature, social media allows users to create their own content as well as to passively view other people's posts (Manning, 2014). In terms of social remittances, creators of own content can be considered social remitters, while passive viewers can be considered recipients of social remittances. Nevertheless, the use of social media to channel remittances blurs the distinction between remitters and recipients of remittances, as each group is likely to be involved in the other as well. Confirming the possible bidirectional nature of social remittances identified in the literature (see Levitt, 2016; Mazzucato, 2010), this sample produces a positive correlation coefficient of 0.38 between posting on and reading about (on social media) the situation in Sri Lanka. Despite being small, this statistically significant (0.01 significance level) positive correlation reflects that respondents sending social remittances are likely to receive social remittances as well.

Table 2: Number of friends or relatives called or texted by respondents

	Daily		Weekly	
	Calls	**Texts**	**Calls**	**Texts**
Min	0	0	0	0
Max	50	100	2,500	11,000
Average	2.94	4.33	19.56	76.21
Standard deviation	5.72	8.92	199.27	877.44
Median	2	2	2	4
Without extreme value				
Extreme value omitted			2,500	11,000
Max			26	75
Average			3.66	6.18
Standard deviation			4.14	8.45

Source: Author's estimates, based on online survey data.

Table 3: Posting and reading about the situation in Sri Lanka on social media

		Reading on social media						
		Many times a day	Once a day	Once every few days	Once a week	Once a month	Never	Total
Posting on social media	Many times a day	18	0	0	0	0	0	18
	Once a day	6	2	0	0	0	0	8
	Once every few days	14	4	3	0	0	1	22
	Once a week	10	3	3	0	0	0	16
	Once a month	17	10	6	2	3	0	38
	Never	19	14	9	7	4	2	55
	Total	84	33	21	9	7	3	157

Note: Survey questions:
A34. How often do you **post** on social media about the situation in Sri Lanka?
A35. How often do you **read** on social media about the situation in Sri Lanka?
Source: Author's estimates, based on online survey data.

While the data collected for this study shows that respondents both post and read content on social media, there is greater indication of receiving—rather than sending—social remittances. As Table 3 shows, the cells below the diagonal from left to right are dense with numbers, while the other diagonal contains mostly zeros. This indicates that respondents reported reading social media posts more frequently. Column 1 shows that 84 of the 157 respondents read social media posts many times a day; this number falls progressively as we move across columns from left to right, reflecting the decreasing frequency of social media use. At the same time, as the last column shows, the highest number (55) recorded refers to never posting content about the situation in Sri Lanka on social media.

Table 4: Level of reliance, posting and reading on social media for information on Sri Lanka

Level of reliance on SM (Q34)	Av. age	SD	No. of obs.
1. Never	51.5	6.4	4
2. Seldom	43.2	16.7	11
3. Sometimes	40.2	14.5	42
4. Often	34.0	11.7	56
5.Always	37.1	13.1	44
Total			157

Posting (Q35)	Av. age	SD	No. of obs.
1. Many times a day	37.8	16.4	18
2. Once a day	36.0	14.4	8
3. Once every couple of days	37.3	14.0	22
4. Once a week	39.2	13.4	16
5. Once a month	34.7	10.4	38
6. Never	39.4	14.3	55
Total			157

Reading (Q36)	Av. age	SD	No. of obs.
1. Many times a day	37.7	14.1	84
2. Once a day	39.5	14.4	33
3. Once every couple of days	36.7	12.1	21
4. Once a week	32.4	10.7	9
5. Once a month	39.0	11.2	7
6. Never	32.7	15.1	3
Total			157

Note: Survey questions:
33. How much do you **rely** on social media for updates on the situation in Sri Lanka?
34. How often do you **post** on social media about the situation in Sri Lanka?
35. How often do you **read** (other posts) on social media about the situation in Sri Lanka?
Source: Author's estimates, based on online survey data.

As seen in the first column in the top panel in Table 4, respondents relied heavily on social media for updates on the situation in Sri Lanka. Those who reported relying on social

media often or always account for 63 percent of the sample. When disaggregated by age, the latter's average age is lower than that of respondents who never or seldom relied on social media. This inverse relationship between age and reliance on social media for social remittances is consistent with the literature (see Kemp, 2022). However, as the table's bottom panel shows, there is no significant age pattern among respondents posting or reading content on Sri Lanka.

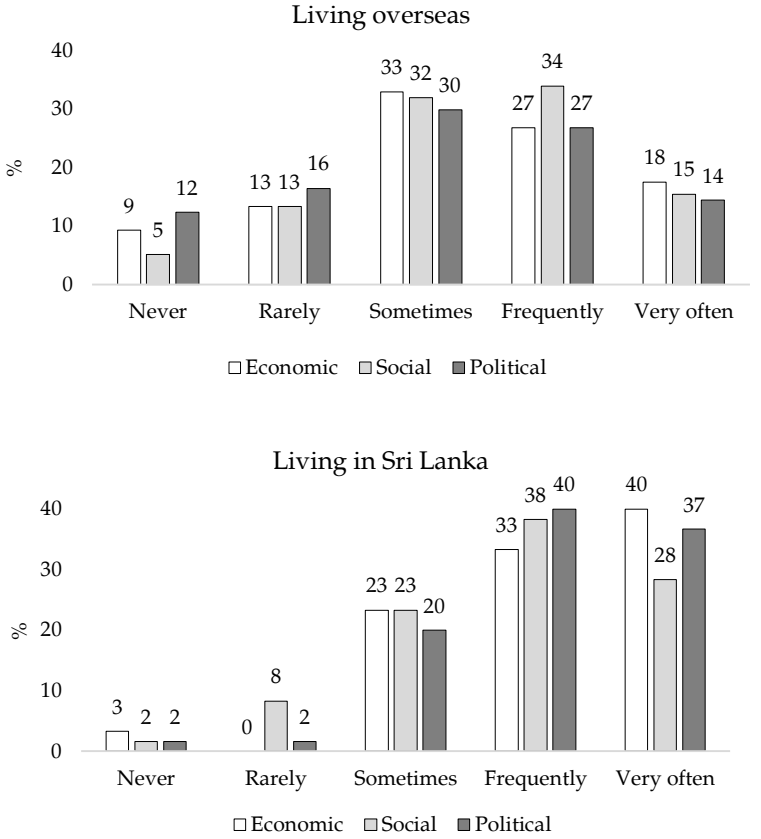
Stress and coping strategies

The socioeconomic and political situation in the country created undue stress on Sri Lankans residing in the country as well as overseas. For those within Sri Lanka, their personal experience of the crisis was stressful, while for those abroad, the knowledge that their family and friends were enduring hardship created stress. During difficult times, those in Sri Lanka tended to share their experiences with migrants overseas, while the latter tended to inquire about Sri Lankan residents' situation. This exchange of information involved comparisons across situations in Sri Lanka and other countries.

Figure 2 shows how often those living overseas and in Sri Lanka mentioned the economic situation in their respective countries of residence. As seen in the bottom panel, residents in Sri Lanka were more likely to mention the problems they faced than Sri Lankans living abroad. For instance, only 18 percent of those residing abroad cited their country's economic situation 'very often', compared to 40 percent of those living in Sri Lanka.

Similarly, a higher proportion of those living abroad 'never' or 'rarely' mentioned their country's economic situation, compared to those living in Sri Lanka. This implies that those living in Sri Lanka send, rather than receive, more information on this aspect. This may be because the situation in Sri Lanka and that in migrants' host countries was fundamentally different, with residents of Sri Lanka facing greater problems daily and thus being more likely to mention the adverse social, economic and political situation.

Figure 2: Frequency of friends and relatives who mentioned the economic situation in their country

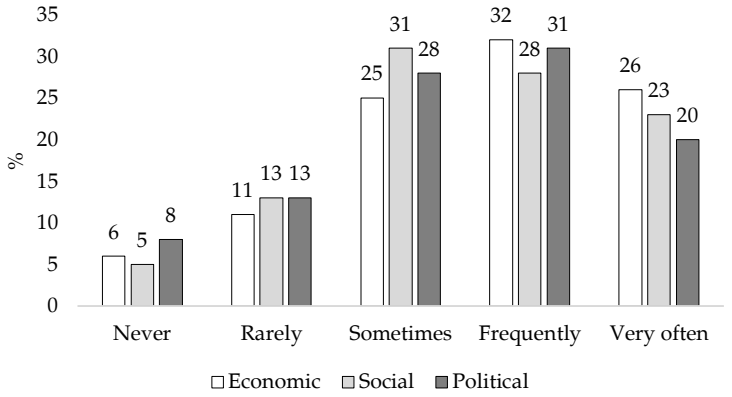


Notes: Sample size is 60 in top panel and 97 in bottom panel.
Survey questions:
A48. How often do your friends and relatives living abroad mention the economic situation in their country?
46B. How often do your friends and relatives living in Sri Lanka mention the economic situation in Sri Lanka?
Source: Author's estimates, based on online survey data.

Social remittances can influence thoughts and behavior. As evident in Figure 3, the majority of the 97 respondents in Sri Lanka compared the country's situation with that of migrants'

destination countries 'sometimes', 'frequently' or 'very often'. Such comparisons are a crucial way in which attitudes, views and behaviors are influenced by social remittances.

Figure 3: Frequency of comparisons between the situation in Sri Lanka and other countries



Note: Sample size is 97 respondents (based in Sri Lanka).
Survey question:
A51. How often do you compare the economic situation in Sri Lanka to that of other countries where your friends and relatives live?
Source: Author's estimates, based on online survey data.

Such exchanges of information during a crisis and comparisons of one's own predicament with that of others (who are better off) can add to the levels of stress experienced by those in Sri Lanka. At the same time, such discussions can also serve as an outlet for stress and improve the mental wellbeing of those affected. Similarly, for those overseas, such discussions may increase their levels of stress if they become worried about the wellbeing of loved ones in Sri Lanka as they acquire more information. However, one-on-one discussions can also help those abroad gain a better understanding of individual situations and ease their anxiety.

In this sample of 157 respondents, over 61 percent reported experiencing higher stress levels associated with discussing Sri

Lanka's problems with their counterparts in other countries. While nearly a quarter reported no change in their levels of stress, only 15 percent experienced relief (top panel in Table 5). This implies that the information and ideas transferred via social media during the crisis generally amounted to negative social remittances. A comparison of the last two columns in Table 5 shows that the increase in stress was higher among Sri Lankans overseas (receiving social remittances from Sri Lanka).

Table 5: Implications of social remittances

Change in stress levels caused by discussing the crises with those abroad	Full sample		In Sri Lanka	Overseas
	Freq.	Percent	Percent	Percent
0 = Fully eliminates	6	3.82	10	8
1 = Decreases	17	10.83	18	3
2 = No change	38	24.2	38	37
3 = Increases a bit	61	38.85	30	42
4 = Increases to the maximum	35	22.29	4	10
Total	157	100.00	97	60

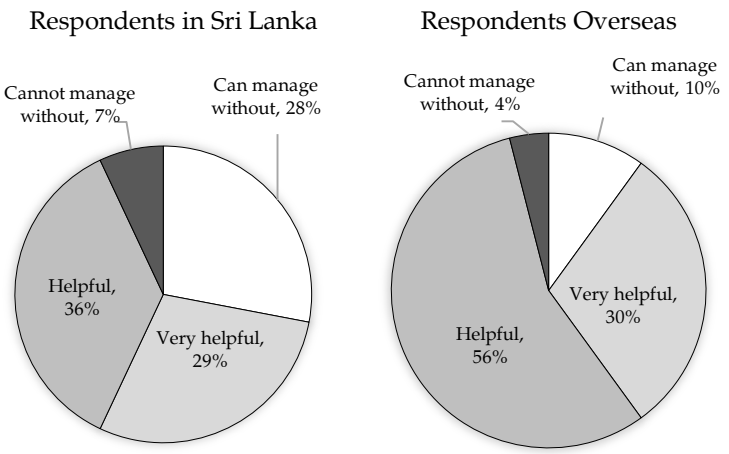
Note: Survey questions:
A63. How does discussing the crisis in Sri Lanka with your family and friends abroad affect your stress levels?
53B. How does discussing the crisis in Sri Lanka with your family and friends in Sri Lanka affect your stress levels?
Source: Author's estimates, based on online survey data.

Figure 4 shows how respondents valued the financial, in-kind and emotional support sent or received during the crisis in Sri Lanka. Out of the three types of support considered, emotional support is correlated with social remittances because it involves expressing encouragement, reassurance and compassion. With regard to social support, there is a notable difference between those sending and receiving social remittances. Of those based in Sri Lanka, 28 percent of respondents reported managing without support from overseas contacts, while 36 percent reported finding the emotional support they received through social remittances helpful.

On the contrary, a far larger share of respondents (56 percent) of those sending social remittances reported that the emotional

support they expressed was helpful; only 10 percent felt that their recipients could manage without the support. As such, when 72 percent of those receiving emotional support in Sri Lanka reported benefiting from such support from abroad, a much higher proportion (90 percent) reported having benefited as perceived by respondents overseas. This difference in views by country of location concerning the capacity of social remittances to support the emotional wellbeing of those affected by the crisis is likely because respondents in Sri Lanka did not identify and understand the value of the emotional support being transferred in subtle ways through social remittances. At the same time, a pattern emerges of respondents in Sri Lanka reporting that recipients could manage without support more so than those abroad, which is evident across financial and in-kind support as well.

Figure 4: Level of helpfulness of support from overseas during the economic crisis



Note: Survey questions:
A67. During this time of crisis, how valuable is the emotional support you receive from your contacts abroad?
57B. During this time of crisis, how valuable is the emotional support you provide your contacts in Sri Lanka?
Source: Author's estimates, based on online survey data.

Table 6: Extent of adjusting coping strategies based on social remittances

Scale of adjustment	Economic crisis	Social crisis
0 = No adjustment	31	31
1 = Little adjustment	24	27
2 = Some adjustment	36	33
3 = A lot of adjustment	9	9
Observations	97	97

Note: Survey questions:
A54. During this crisis period, how have you adjusted your economic coping strategies based on information received from friends and relatives living abroad?
A55. During this crisis period, how have you adjusted your social coping strategies based on information received from friends and relatives living abroad?
Source: Author's estimates, based on online survey data.

In investigating how social remittances influence coping strategies with respect to a crisis in the country, the data shows that, on a four-point Likert scale, the majority of respondents indicated no or little adjustment in their coping strategies. Specifically, with regard to the economic crisis, 55 percent of the 97 respondents based in Sri Lanka said their coping strategies had either changed little or not at all as a result of social remittances. For the social crisis, 58 percent reported either no or little adjustment in their coping strategies due to social remittances (Table 6). These findings show that social remittances have not been instrumental in changing people's behavior in terms of coping strategies.

Influence on attitudes

During the socioeconomic and political crises in Sri Lanka, the transfer of social remittances via social media had a significant impact on perceptions, beliefs and identities in Sri Lanka. At the same time, social remittances from Sri Lanka to countries overseas during the crises influenced the perceptions of Sri Lankans abroad. Nevertheless, some salient differences were evident between the inflow and outflow of social remittances during this time. The level of influence of ideas of those outside the country

on attitudes in Sri Lanka were measured on a five-point Likert scale in Table 7.

The left-hand-side panel corresponds to respondents in Sri Lanka receiving social remittances from abroad; the right-hand-side corresponds to those overseas and receiving social remittances from Sri Lanka. In the case of inflows of social remittances to Sri Lanka, the percentage of respondents reporting they were not at all influenced is much higher than respondents abroad receiving outflows of social remittances from Sri Lanka. Similarly, the percentage of respondents reporting that social remittances had little influence is higher among those in Sri Lanka than those overseas. Across both groups in and outside Sri Lanka, there is a sizable group reporting the 'moderate' influence of social remittances. The highest percentage (43 percent) reported that social remittances had 'a lot of influence' on attitudes to the social crisis among those abroad. At the same time, the share of respondents reporting that social remittances had a lot of influence on their attitudes to the crisis is much higher among those living overseas. This is consistent with previous findings that migrants based overseas were more influenced by social remittances related to the crisis than their peers in Sri Lanka.

Outflows of social remittances from Sri Lanka correspond to a higher percentage of respondents reporting that these remittances had either a 'moderate' or 'a lot of' influence on the attitudes of Sri Lankans living abroad. In both groups—those in and outside Sri Lanka—social remittances appeared to 'completely' influence the attitudes of only a small share of each sample, as seen in the last row in Table 7. These findings imply that outflows of social remittances were more likely to have shaped attitudes to and opinions about the crisis in Sri Lanka than inflows of social remittances. This can be identified as one of the key reasons for the large-scale drop in inflows of financial remittances to the country. Weeraratne (2022) similarly finds that inflows of monthly financial remittances fell for several reasons, including migrants' dissatisfaction with the situation in Sri Lanka as well as their desire to benefit from the wide disparity in formal and informal foreign exchange rates offered through remittance channels.

Table 7: Level of influence of social remittances on attitudes to the ongoing crisis in Sri Lanka

	In Sri Lanka			Overseas		
	Inflows of social remittances from abroad %			Outflows of social remittances from Sri Lanka %		
Level of influence on attitudes	**Econ.**	**Soc.**	**Polit.**	**Econ.**	**Soc.**	**Polit.**
0 = Not at all influenced	26	30	30	10	13	18
1 = Little influence	23	25	27	10	10	12
2 = Moderate influence	28	29	28	33	32	27
3 = A lot of influence	20	13	12	37	43	38
4 = Completely influenced	4	3	3	10	2	5
Total	100	100	100	100	100	100
Ways in which flows of ideas helped during the crises in Sri Lanka	**Econ.**	**Soc.**	**Polit.**	**Econ.**	**Soc.**	**Polit.**
Understood the crisis	35	32	33	43	30	32
Understood general implications	27	35	36	20	28	40
Understood personal implications	21	15	11	25	5	17
Found general solutions for Sri Lanka	3	6	8	5	8	5
Found personal solutions for my household	14	11	11	7	28	7
Total	100	100	100	100	100	100

Note: Sample size is 97 for left-hand-side panel (inflow) and 60 for right-hand-side panel (outflow).
Survey questions:
A42. How have the ideas of your friends/relatives living abroad affected your attitudes to the ongoing economic crisis in Sri Lanka?
A43. In what ways have the ideas of your friends/relatives living abroad helped you during the ongoing economic crisis in Sri Lanka? Select all applicable answers.
A44. How have the ideas of your friends/relatives living abroad affected your attitudes to the ongoing social crisis in Sri Lanka?
A45. In what ways have the ideas of your friends/relatives living abroad helped you during the ongoing social crisis in Sri Lanka? Select all applicable answers.
A46. How have the ideas of your friends/relatives living abroad affected your attitudes to the ongoing political crisis in Sri Lanka?
A47. How has your regular communication with friends/relatives living abroad shaped your above-mentioned attitudes to the ongoing political crisis in Sri Lanka? Select all applicable answers.
40B. How have the ideas of your friends/relatives living in Sri Lanka affected your attitudes to the ongoing economic crisis in Sri Lanka?

Table cont.
41B. In what ways did the opinions of your friends/relatives living in Sri Lanka help you during the current economic crisis in Sri Lanka? Select all that apply.
42B. How have the ideas of your friends/relatives living in Sri Lanka affected your attitudes to the ongoing social crisis in Sri Lanka?
43B. In what ways did the opinions of your friends/relatives living in Sri Lanka help you during the current social crisis in Sri Lanka? Select all that apply.
44B. How has your regular contact with friends/relatives living in Sri Lanka affected your attitudes to the ongoing political crisis in Sri Lanka?
45B. In what ways did the opinions of your friends/relatives living in Sri Lanka help you during the current political crisis in Sri Lanka? Select all that apply.
Source: Author's estimates, based on online survey data.

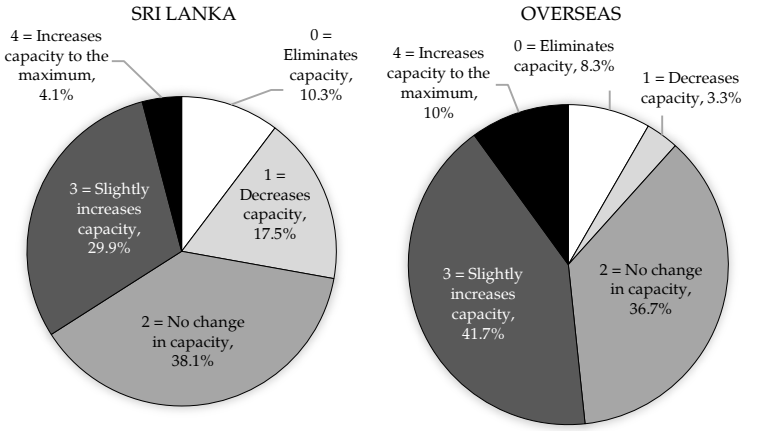
The most important ways in which social remittances influence attitudes is depicted in the bottom panel of Table 7. As noted, a very high proportion of respondents reported that their understanding of the economic crisis in Sri Lanka had increased as a result of social remittances. Inflows of social remittances from other countries contributed to a better understanding of the economic crisis for 35 percent of the sample, while the corresponding values for the social and political crises are 32 and 33 percent, respectively. At the same, outflows of social remittances helped 43 percent of the sample living overseas understand the economic crisis better, while the corresponding values for the social and political crises are 30 and 32 percent, respectively.

A high percentage of both groups—those receiving social remittances from abroad as well as from Sri Lanka—reported a better understanding of the general implications of the various crises as opposed to implications at a personal level, with one exception. About 25 percent of the sample reported that outflows of social remittances from Sri Lanka had increased their understanding of the personal implications of the country's economic crisis. This reflects that information on the economic crisis transferred by those in Sri Lanka to migrants overseas shaped the latter's ideas to a great extent. At the same time, exchanges of social remittances helped respondents find personal solutions to each crisis, with 28 percent reporting this result with respect to Sri Lanka's social crisis.

Further investigation of how social remittances helped respondents find solutions to the challenges they faced due to the

country's crises shows that, while the majority of those living in Sri Lanka reported no change in their capacity to find solutions, the opposite was true for a large share of migrants. Specifically, 42 percent of migrants reported that social remittances had increased their capacity to find solutions 'a little' while, for those in Sri Lanka, this was only 30 percent (Figure 5). While 10 percent of migrants reported that social remittances had helped them find solutions, among those in Sri Lanka the corresponding share was only 4 percent. This indicates that outflows of social remittances from Sri Lanka were more helpful to migrants than inflows of social remittances were for Sri Lankan residents.

Figure 5: Social remittances and the capacity to find solutions to crisis-related challenges (percentage of respondents)



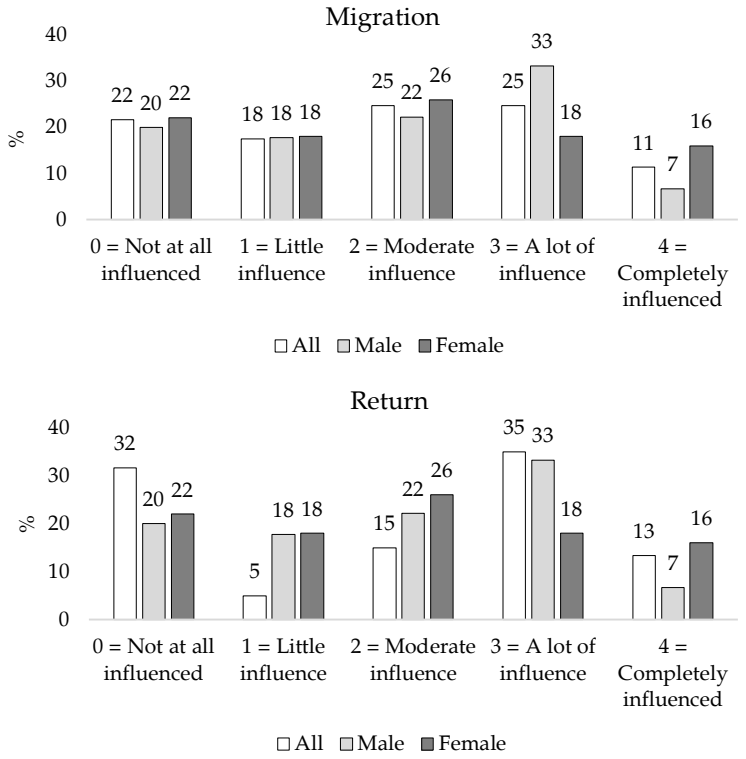
Note: Survey questions:
A64. How does discussing the crisis in Sri Lanka with your family and friends abroad affect your capacity to find solutions to the challenges you face?
54B. How does discussing the crisis in Sri Lanka with your family and friends in Sri Lanka affect their capacity to find solutions to the challenges they face?
Source: Author's estimates, based on online survey data.

Views on migration and return

When faced with various aspects of the socioeconomic and political crises in Sri Lanka, many respondents considered opting

to migrate as a solution, while those abroad reconsidered their decision to return to Sri Lanka, based on social remittances received from the country.

Figure 6: Influence of social media on views on migration and return during the crisis



Notes: Survey questions:
A59. How are your views on migration influenced by your friends and relatives abroad?
49B. How are your views on returning to live (not visiting on holiday) to Sri Lanka influenced by your friends and relatives in Sri Lanka?
Source: Author's estimates, based on online survey data.

Figure 6 examines the influence of social remittances on attitudes to migration and return. In the case of migration

decisions made by respondents resident in Sri Lanka, inflows of social remittances moderately influenced 25 percent of the 97 respondents in Sri Lanka, influenced 25 percent 'a lot' and 'completely' influenced the views of another 11 percent. When we disaggregate these influences by gender, we see that more women (16 percent) were 'completely' influenced by what their friends and relatives said, relative to men (7 percent). At the same time, far more men (33 percent) than women (18 percent) reported that their views on migration had been influenced 'a lot' by social remittances from overseas.

The bottom panel in Figure 6, with regard to overseas respondents' views on return, shows that far more people abroad were not influenced by social remittances. Similarly, fewer people said that their views on return were influenced 'a little' (5 percent) or moderately (15 percent) by social remittances from Sri Lanka relative to views on migration from the country. As such, nearly half the subsample overseas reported that their views on returning to Sri Lanka were influenced either 'a lot' or 'completely' by social remittances from Sri Lanka. This influence of social remittances on respondents' views on return show distinct gender patterns. Specifically, among men residing overseas, 75 percent said that their views on return were influenced either moderately, 'a lot' or 'completely' by social remittances. On the contrary, among women, the largest share of 44 percent indicated that their views on return were not influenced at all by social remittances from Sri Lanka.

Table 8 records respondents' views on return and migration by the extent to which they relied on social media for information on Sri Lanka's crises. In the subsample of 97 respondents in Sri Lanka (top middle panel), among those who seldom relied on social media, exactly half said that their views on migration were not influenced 'at all' or only 'a little' by social remittances. However, as seen in the subsequent panels, this combined share shrinks as respondents' reliance on social media increases. This indicates a positive relationship between reliance on social media and the influence of social remittances on views on migration. However, no such clear pattern is evident in the influence of social

media on return decisions and reliance on social media for social remittances.

Table 8: Reliance on social media and influence on views on migration during the crisis

		Reliance on social media				
		1. Never	2. Seldom	3. Sometimes	4. Often	5. Always
Views on migration (%)	0 = Not at all influenced	50	38	19	20	20
	1 = Little influence		13	26	17	12
	2 = Moderate influence		25	30	20	28
	3 = A lot of influence		13	19	37	20
	4 = Completely influenced	50	13	7	6	20
	Total	100	100	100	100	100

Note: Subsample size is 97.
Survey questions:
A33. How much do you rely on social media for updates on the situation in Sri Lanka?
A59. How are your views on migration influenced by your friends and relatives abroad?
Source: Author's estimates, based on online survey data.

Summary of findings and way forward

While analyses of the financial remittances received by Sri Lanka are well established, there has been little or no focus on social remittances. Given the high significance of international migration, especially for employment, financial remittances are accompanied by social remittances in and out of the country. Against this backdrop, this chapter looks at the role played by social media in transferring social remittances during Sri Lanka's economic, social and political crises.

The study finds that, unlike financial remittances, which flow into Sri Lanka, social remittances are bidirectional. For social remittances channeled through social media particularly, the interactive characteristics of social media allow social remittances

to flow in and out of the country as individuals create new content and interact with existing content, in turn generating new content or social remittances. This is evident from the positive and statistically significant correlation between posting and reading content on social media about Sri Lanka. Despite this correlation, however, respondents appear more likely to read content on social media than to post it. This reflects a significant pattern in terms of receiving—rather than sending—social remittances through social media. Nevertheless, if future studies investigate the interaction between reading posts on social media, this finding may be challenged.

Consistent with the literature on social media, this study finds an inverse relationship between age and reliance on social media. Given that the study extends the use of social media to transferring social remittances, this finding could be developed further, given this inverse relationship.

People living in Sri Lanka tend to provide more information about the country's economic, social and political situation than those overseas sharing the same information about their country of residence. This may be because the situation in Sri Lanka is relatively unusual. Nevertheless, despite sharing information on their situation, people in Sri Lanka benefit only to a limited degree from the ideas and views of their friends and relatives overseas. In most cases, exchanging information about the crisis on social media increases stress levels among Sri Lankans here and abroad. This increase in stress is more profound among Sri Lankans based overseas (and receiving social remittances from Sri Lanka). This implies that the information and ideas transferred via social media during the crisis generally amounted to negative social remittances.

The study also finds that social remittances have not been instrumental in changing people's coping strategies. It is likely that this finding was influenced by respondents' inability to draw a link between social remittances received via social media and their own actions, since such influences occur at a subconscious level. As such, during the crisis, the receipt of social remittances

played a more important role among those receiving social remittances than they may have understood.

The exchange of social remittances also contributed to respondents' ability to devise personal solutions to each type of crisis. At the same time, the study finds that more people residing overseas were influenced by social remittances related to the crisis than people based in Sri Lanka. This indicates that outflows of social remittances from Sri Lanka were more likely to shape attitudes to and opinions about the crisis than inflows of social remittances to the country. Such social remittances from Sri Lanka overseas may also be linked to the large-scale drop in inflows of financial remittances to Sri Lanka in 2022. It is likely that financial remittance patterns and behaviors among Sri Lankans abroad were influenced by such social remittances as the emerging culture of constant protest against the political leadership, possibly encouraging the use of informal financial remittance channels instead.

At the same time, our findings confirm that social remittances channeled through social media influenced people's views on migration from Sri Lanka at various levels, with more women being completely influenced than men. Similarly, views on returning to Sri Lanka for good were also influenced by social remittances transferred via social media. Here, more men were influenced than women. Given that many Sri Lankans are leaving the country because of the ongoing economic crisis, there is growing concern over the likely skills deficit during growth and recovery in coming years. In this context, this finding on the influence of social media over attitudes to return could be harnessed to attract more returning migrants back to Sri Lanka. Moreover, reliance on social media and the influence of social remittances over views on migration have a positive relationship with each other.

Finally, though less understood, similarly to financial remittances, social remittances also play an important role in Sri Lanka. Social media plays a key role in the transfer of social remittances to and from Sri Lanka. Future research should draw

on a representative sample of the population in Sri Lanka and of Sri Lankan migrants overseas, and examine more closely why social remittance outflows from Sri Lanka are more evident than inflows. At the same time, these findings should be factored in as valuable empirical evidence to harness the potential of the nexus between social remittances and social media for the social, economic and political development of the country. Some suggestions along these lines include better leverage of social remittances from Sri Lanka to migrants overseas to improve their assimilation outcomes in countries of destination, such as connecting with other Sri Lankans in their host countries. Similarly, social remittances could be leveraged to improve the return and reintegration experience in Sri Lanka.

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Chapter 9

The impact of migration and remittances on the empowerment of women left behind: Evidence from Egypt

Nada Rostom, Helene Syed Zwick, Yasmine Abdelfattah

Introduction

While the literature draws attention to the impact of international migration on migrants' countries of origin, less is known about its impact on the empowerment of women left behind (WLB). Women's empowerment generally includes three main pillars: women's employability, perception of gendered roles and women's decision-making (Tuccio & Wahba, 2018; Samari, 2021). Understanding the relationship between migration and the empowerment of WLB is of particular importance in countries governed by patriarchal structures, such as Egypt. Patriarchal systems create unequal gender empowerment and conflicting hierarchies of power that can be reflected in women's roles in the household and in labor market outcomes (de Haas & Van Rooij, 2010; Samari, 2021). The United Nations Department of Economic and Social Affairs (2020) indicates that most Egyptian emigrants are men, often leaving women and children behind and moving temporarily to Arab countries, which are also characterized by patriarchal systems. Hence, the emigration of men can be a source of significant changes in the lives of WLB that are worth studying.

The literature on the impact of migration on the empowerment of WLB has grown worldwide. Some studies find that male migration allows women to become the primary

decision-makers in household affairs and gives them greater freedom of movement (Bojorquez et al., 2009) as well as opportunities for self-determination (Matz & Mbaye, 2017) and financial autonomy (Singh, 2018). Other evidence shows that women tend to increase their home production to fill the role of the migrant, substitute wage work for nonwage work (Rodriguez & Tiongson, 2001; Amuedo-Dorantes et al., 2006; Mendola & Carletto, 2009; Acosta, 2011) and experience policing by their extended families (McEvoy et al., 2012) and their husbands even when abroad (Lopez-Ekra et al., 2011).

In a scoping review, Fernández-Sánchez et al. (2020) argue that the net effect of migration on WLB empowerment depends on the destination and sending countries' contexts. Male migrants can, and often do, contribute to household income through remittances, while WLB can become the primary decision-makers in managing household affairs. If such is the case, WLB would then face expanded responsibilities and duties, which may enable them to exercise greater authority, thereby providing a channel for greater empowerment. The authors argue that such a nexus remains relatively underexplored in the literature.

Few studies have focused on the Middle East and North Africa (MENA) region in this context, and even fewer on Egypt. Using the 2006 wave of the Egyptian Labor Market Survey (ELMPS), Binzel and Assaad (2011) show that women living in remittance-receiving households in Egypt substitute wage work for nonwage work. More recently, Tuccio and Wahba (2018) and Samari (2021) have found that households with a male return migrant value more traditional gender norms or adopt and internationalize more unequal ones than households with no migrants in Jordan and Egypt, respectively.

This chapter offers new evidence of the impact of migration and remittances on the empowerment of WLB in Egypt by extending the literature in three ways. First, we draw evidence for the first time from data from three ELMPS waves (2006, 2012, and 2018). Second, we adopt a comprehensive definition of empowerment that includes the participation of WLB in the labor

market, differentiating between wage and nonwage unemployment, as well as empowerment indicators that reflect whether a woman (i) has freedom of movement, (ii) contributes to or makes decisions independently within the household, and (iii) has financial independence. Third, we use a novel methodology based on parametric (probit and two-stage least squares instrumental variables or 2SLS IVs) and nonparametric (matching) models. Throughout, we account for different migration patterns and labor market characteristics in rural and urban areas by running the regressions separately for rural and urban areas.

This chapter is organized as follows. The second section reviews the empirical literature relevant to our study. The third section looks at the data on migration and remittances as well as the socioeconomic characteristics of WLB and describes our empirical approach. The fourth section presents our main empirical findings and the last section concludes the chapter.

Theoretical considerations: Social remittances, gender norms and women's empowerment

Social remittances and gender norms

The empowerment of WLB is considered a form of social remittances. These are different from financial remittances, which refer to interpersonal financial transfers between migrants and their country of origin. Rather, social remittances are a recent concept that was introduced by Levitt (1998, p. 927) to describe 'the ideas, behaviors, identities, and social capital that flow from receiving- to sending-country communities.' While difficult to define and quantify, the concept carries development potential for less-developed countries (Isaakyan & Triandafyllidou, 2017) as it can lead to behavioral and norm changes in individuals, groups and communities.

Among social remittances, gender norms have generated increasing interest. Gender is a social construct differentiating between males and females, and gender norms are defined as ideas about how women and men should be and act. These

include the social rules and expectations that keep the gender system complete. Cislaghi and Heise (2020) list four features that characterize gender norms. First, gender norms are learned in childhood, influenced by parents and peers, and reinforced in a larger social context, including school, religion and the media, among other institutions. Second, a lack of equity in gender norms implies a lack of equity in power relations, generally to the detriment of women and girls. Third, the institutions that intersect with individuals' lives reproduce and strengthen existing gender norms. These institutions are defined as the formal and informal laws, social norms and practices that shape the decisions, choices and behaviors of groups, communities and individuals (Jütting et al., 2008). Fourth, social interactions build gender norms. Hence, gender norms can either empower or constrain the rights and opportunities of women and men.

The impact of gender norms on women's empowerment

Gender norms affect women's empowerment by affecting perceptions related to the roles that women and men should play in society. Like social remittances, women's empowerment carries conceptual and analytical challenges that make it difficult to operationalize. The difficulty in defining and measuring empowerment comes from its multidimensionality and the fact that it is more a process than a state.

In her seminal work, Kabeer (1999) bases the definition on three inter-related and indivisible dimensions: (i) resources as the access and future entitlement to material, human and social resources, (ii) agency as the ability to define one's goals and engage in decision-making and the negotiation needed to act on those goals, and (iii) achievements as the outcomes of choices made. Kabeer (2003) strengthens the conceptualization of relational autonomy by making a distinction between active agency (defined as purposeful behavior) and passive agency (defined as actions taken when there is little choice). Narayan (2002) describes women's empowerment as an increase in resources and capabilities to partake in, negotiate with, exercise control over, and hold responsible the institutions that affect their lives.

Empirical evidence

A scarce, polarized and scattered literature with inconsistent results

The empirical economic literature on the impact of migration and remittances on gender norms and women's empowerment has grown rapidly, including studies such as Fakir and Abedin (2021), Luna and Rahman (2019), Tuccio and Wahba (2018) and Bojorquez et al. (2009). However, this literature is polarized, drawing attention to a few less-developed countries, namely Bangladesh, Nepal and India. Besides, the literature in this area is scattered as studies adopt different perspectives with various indicators of empowerment (Fernández-Sánchez et al., 2020). Moreover, their findings are inconclusive. Such inconsistency in results comes mainly from the lack of comparability across studies and the inherent complexity of the empowerment concept.

Among the studies relevant to this chapter is the recent work of Fakir and Abedin (2021), who examine the microeconomic effect of migration on women's empowerment in rural Bangladesh, using the 2011/12 Bangladesh Integrated Household Survey. Two econometric techniques are used to control for selectivity and endogeneity: propensity score matching and IV estimation. The propensity score matching technique compares the empowerment status of women in migrant households using observed values of indicators with estimated counterfactual values in a hypothetical without-migration scenario. The analysis leads to mixed findings. While women enjoy greater ownership of assets, a better status within the household, freedom of physical mobility, and lower domestic abuse, they do not benefit from an improvement in their decision-making authority over the productive utilization of resources.

Drawing on fieldwork in rural Bangladesh, Luna and Rahman (2019) evaluate the impact of male migration on the empowerment of spouses left behind compared to households with no migrants. Four areas of gender norms are considered: access to economic resources, physical mobility, residential

independence, and decision-making roles in key family affairs. The findings indicate that WLB are exposed to processes of greater empowerment compared to women in nonmigrant households.

An important series of studies have focused on Nepal. The findings of Kaspar (2005) and Sijapati et al. (2017) indicate that male migration leads to an increase in women's mobility and decision-making roles. However, this empowerment implies greater stress and additional workloads, both in terms of domestic or care work and productive nondomestic work. Maharjan et al. (2012) also obtain mixed findings. Using a mixed-based approach, the authors administered a household survey to 509 migrant and nonmigrant households in rural Nepal. They examine the changes in women's roles and responsibilities in the absence of male household heads. The analysis shows that the nature and extent of the impact vary with the pattern of migration. In particular, the influence of male migration on family members left behind depends on their ability to hire labor using the remittances earned. Thus, when remittances are high, the workload of those left behind decreases; when remittances are low, this workload tends to increase. The findings indicate a growing gender gap in workload following migration. More specifically, migrant households experience a wider gender gap than nonmigrant households. On another note, the findings do not corroborate the impact of migration on women's ownership of assets, but reveal that women in migrant households have a greater role in household decision-making than those in nonmigrant households.

In examining the impact of male migration on women's empowerment in Nepal, Doss et al. (2022) introduce additional factors to the analysis, such as caste, ethnicity and the husband's status as a migrant. The authors use the abbreviated women's empowerment in agriculture index (A-WEAI) to measure empowerment and confirm that patterns of empowerment differ across its indicators. Moreover, the findings show that WLB in nuclear households increase their control over agricultural production and income more than women in nonmigrant households.

A growing stream of literature has examined the impact of migration on economic empowerment in relation to the labor market, especially in rural settings, including de Brauw et al. (2021), Slavchevska et al. (2019), Kan and Aytimur (2019) and Lokshin and Glinskaya (2009). Generally, the findings suggest that male migration leads to an increase in the workload or participation of women in agricultural production. De Brauw et al. (2021) assess the impact of male migration on women's labor participation and empowerment outcomes in rural Bangladesh. The project-level women's empowerment in agriculture index (pro-WEAI) (Malapit et al., 2019) is used as the empowerment indicator. The findings are based on a panel dataset on jute producers and suggest that male migration is not associated with women's empowerment in the short term and with increased use of female household labor. The study also shows no significant decreases in gender wage gaps. The authors interpret these findings by referring to the lack of perfect substitutability between male and female labor.

Empirical evidence from the MENA region and Egypt

The relevant literature on the Middle East and Egypt is scarce. To the best of our knowledge, only Binzel and Assaad (2011), Tuccio and Wahba (2018), and Samari (2021) have conducted comparable studies. Binzel and Assaad (2011) examine the impact of male international migration on the female labor supply in Egypt, using cross-sectional data from the 2006 wave of the ELMPS. The authors use both parametric (probit and tobit) and nonparametric (matching) techniques to estimate the local average treatment effect and address the endogeneity of living in a migrant household through an IV approach. The results show a decrease in wage work for both rural and urban samples, suggesting that women who live in a household with a current international migrant are more likely to engage in nonwage work and subsistence work. Such findings conform to established gender norms in Egypt. Among households where the migrant is not remitting funds from abroad, the results indicate that the increase in nonwage employment is guided by the household's

need to replace the migrant's labor. Overall, the authors conclude that women's status in the household does not necessarily improve as a result of male migration.

Tuccio and Wahba (2018) and Samari (2021) examine the impact of migration on women's empowerment from another perspective, by considering return migration rather than migration. They focus on changes in gender norms in Jordan and Egypt, respectively. For instance, Tuccio and Wahba (2018) draw attention to the impact of international return migration on the transfer of norms in Jordan. Using three different measures of gender norms—the role of women, female freedom of mobility and female decision-making power—the authors rely on a multi-equation mixed system in a conditional mixed process framework to control for emigration and return migration selectivity. The findings reveal that women who live with a return migrant family member are more likely to bear traditional gender norms, less likely to enjoy freedom of mobility, and less likely to make decisions on their own than women in households with no migration experience. Interestingly, the analysis shows that the country of destination has a significant influence on the outcome. Indeed, having lived in a conservative Arab country makes the returnee develop more conservative norms once back than before migrating.

Samari (2021) explores for the first time the impact of male return migration from other Arab countries on gender norms and household gender dynamics in Egypt. The author uses data from the 2006 and 2012 ELMPS and employs various multivariate models to examine the associations between return migration and gender norms and decision making while accounting for individual and household characteristics. To address the endogeneity of migration and gender norms, the author includes in the analysis treatment effects regression models. The findings show that return migration from Arab countries is linked to less egalitarian beliefs and more restrictive gender norms for women. Women's role within the household is also more limited in the case of return migration as women in migrant households have fewer decision-making capacities in both 2006 and 2012. Given the

contexts in Arab destination countries, Samari (2021) explains that return migration to Egypt may import worse attitudes to women and conservative patriarchal ideals.

This chapter aims to extend the findings of Binzel and Assaad (2011) and Samari (2021) in several ways: (i) it uses data from three waves of the ELMPS (2006, 2012 and 2018); (ii) it defines women's empowerment in a comprehensive way, including both labor market dimensions and social norms; and (iii) it focuses on current male migrants rather than return migrants.

Data and methods

We rely on data from the 2006, 2012, and 2018 ELMPS. The ELMPS has been carried out by the Economic Research Forum in cooperation with Egypt's Central Agency for Public Mobilization and Statistics since 1998, and is a longitudinal and nationally representative survey. The survey data is collected at the household level and provides information on household members in terms of their socio-demographic information, education level, employment outcomes, and income status. The survey is well suited to our research purposes because it provides detailed information on whether the household has any members living abroad and whether this migrant is sending remittances to those left behind. The survey also contains rich modules on respondents' opinions of gender norms.

Our sample consists of women between 20 and 60 years old who were interviewed in 2006, 2012 or 2018. Table 1 shows the working sample for each of the three ELMPS waves.

Table 1: Number of observations per wave of the ELMPS

Round	Number of observations	Number of households
2006	9,551	7,485
2012	12,618	10,609
2018	15,090	13,293

Source: Authors' calculations based on ELMPS dataset.

Dependent variables

WLB labor market participation. For the first battery of outcomes, we focus on labor market outcomes. We observe changes in three types of labor activities undertaken in the last three months of the interview: wage work, subsistence work and nonpaid family work. A woman is considered working for a wage if she has been self-employed or is an employer or employee. Subsistence work is defined as engaging in agricultural activities, raising livestock and/or producing ghee, butter or cheese for domestic consumption. Nonpaid family work refers to working for a family business (such as agricultural land) without being paid.

We differentiate between urban and rural areas. In urban areas, 23 percent of all women in our sample work for a wage, compared to only 13.5 percent in rural areas. Likewise, 25 and 33.7 percent engage in subsistence work and unpaid work, respectively, in rural areas, compared to only 4 and 5 percent in urban areas. The t-test results show that the labor market outcomes of women residing in an urban household with a migrant are not significantly different from those living in an urban household without a migrant. However, a significant difference is observed between the two groups in rural areas.[1]

Women's empowerment. The second battery of outcome variables includes measures of women's empowerment. As a proxy for gender norms, we use three variables: women's decision-making in the household (WDMH), women's mobility (WM), and personal savings (PS). To construct the WDMH variable, we use eight questions from the ELMPS that ask interviewed women about their role in decisions made within the household on the following aspects of day-to-day life: large household purchases; daily household purchases; visiting family, friends and relatives; food cooked every day; medical treatment; buying clothes; taking children to the doctor; and sending children to school.

The responses to these questions are recorded on a categorical scale (1 = respondent, 2 = respondent and husband, 3 =

[1] Results available on request.

respondent, husband and in-law, 4 = husband, 5 = in-laws, 6 = others). We rescale these variables to take a value of 1 if a woman makes a decision interdependently, 2 if she must make it with someone else (a spouse and parents), and 3 if she is not part of the decision. After rescaling these eight questions, we create an index that increases by one point if a woman states that she makes decisions independently or with another family member for each of these life aspects. In that sense, a woman who engages in all day-to-day life decisions receives a score of 8 and a woman who does not engage in any receives a score of 0.

Likewise, to construct the WM variable, we create a four-point index using questions that ask from whom a woman needs permission when she goes to the following locations: the local market, the doctor on her own, the doctor accompanied by children, to visit friends or relatives. The responses are also rescaled and indexed as explained for the WDMH index. Women in both urban and rural areas receive a score of 5 out of 8 for the WDMH index, and 2 out of 4 for the WM index (Table 2). The descriptive statistics indicate great variations for women in rural areas (wide standard deviation). The t-test results show a negative impact of migration on all women's empowerment indices in both urban and rural areas.[2]

Independent variables

A migrant household is defined as a household where one or more of its members had been living abroad for more than six months at the time of the interview. While the questionnaire collects information on more than one migrant per household, instances of having more than one migrant are rare. We settle for creating a binary variable that takes a value of 1 if women live in a household with at least one male migrant. Male migrants[3] in the sample reached 5.10 percent in 2006, 6.84 percent in 2012 and 5.34

[2] Results available on request.

[3] Information on the gender of the migrant is provided only in the 2012 and 2018 waves, but not in the 2006 wave. However, migration in Egypt is known to be male-dominated. In the 2018 wave, female migrants constituted only 2 percent of all migrants.

percent in 2018. The share of migrant households in rural areas is 4.3 percent and in urban areas is 3.2 percent. Descriptive statistics for migrant and nonmigrant households are provided in Table 2.

In an alternative specification, we limit the sample to households that have received remittances in the last 12 months prior to the survey and households without a migrant. This allows us to examine how labor market decisions and opinions of WLB on gender norms might change with money flowing into the household.

Table 2: Descriptive statistics, by region

	Urban areas		Rural areas	
	Mean (SD)	N	Mean (SD)	N
Personal savings	0.356	15,683	0.292	19,291
	(0.479)		(0.455)	
WDMH	5.535	14,520	5.119	18,359
	(2.227)		(2.433)	
WM	2.310	15,652	2.212	19,265
	(0.96)		(1.078)	
Wage worker	0.230	16,827	0.135	20,342
	(0.421)		(0.341)	
Subsistence worker	0.042	15,454	0.246	19,361
	(0.201)		(0.431)	
Unpaid worker	0.057	16,827	0.337	20,342
	(0.232)		(0.473)	
Female household head	0.119	16,827	0.118	20,342
	(0.324)		(0.322)	
Educational attainment	0.286	16,827	0.102	20,342
	(0.452)		(0.303)	
Wealth quintile 1	0.069	16,827	0.273	20,340
	(0.254)		(0.445)	
Wealth quintile 2	0.125	16,827	0.261	20,340
	(0.331)		(0.439)	
Wealth quintile 3	0.179	16,827	0.221	20,340
	(0.384)		(0.415)	
Wealth quintile 4	0.259	16,827	0.157	20,340
	(0.439)		(0.364)	

Table cont.

	Urban areas		Rural areas	
	Mean (SD)	N	Mean (SD)	N
Wealth quintile 5	0.37	16,827	0.089	20,340
	(0.482)		(0.284)	
Age	37.243	16,827	35.630	20,342
	(11.662)		(11.349)	
Number of children under six years old	0.426	16,827	0.601	20,342
	(0.702)		(0.807)	
Number of children over six years old	1.294	16,827	1.754	20,342
	(1.645)		(2.034)	
Remittances	0.021	16,827	0.053	20,342
	(0.143)		(0.224)	
Share of men with secondary education	0.377	16,827	0.354	20,342
	(0.074)		(0.032)	
Share of men in the private sector	0.343	16,827	0.356	20,342
	(0.039)		(0.031)	
Share of men in the agricultural sector	0.072	16,827	0.127	20,342
	(0.062)		(0.042)	
Share of unemployed men	0.025	16,827	0.020	20,342
	(0.017)		(0.006)	
Share of households with a migrant	0.032	16,582	0.043	20,342
	(0.032)		(0.036)	

Source: Authors' calculations based on ELMPS dataset.

Covariates

The model includes individual-level variables that have been identified in the literature as potential determinants of women's status and migration: age, age at marriage, education, wealth quintiles, and count of children under six. Women's age is a continuous variable expressed in years. Education is a dummy variable grouping those who have obtained tertiary education and those who stopped before reaching this level. Wealth quintiles are estimated using principal component analysis, capturing the variability in assets owned and grouping households into five groups: the poorest, poor, middle, rich, and richest. Community characteristics are also included, such as the number of men with secondary education, the share of men

working in the private sector, the share of men working in the agricultural sector, and the share of unemployed men at the community level. Table 2 provides descriptive statistics.

Identification strategy

A well-documented problem in the literature on migration, remittances and labor market outcomes is the endogeneity arising from self-selection bias and reverse causality (see Kandel & Kao, 2001; Adams & Page, 2005; Mueller & Shariff, 2011; Jimenez-Soto & Brown, 2012). Risk-taking is one of the most important unobservable characteristics that has been mentioned repeatedly as a trait that migrants self-select. Reverse causality also plays a role in this context. For instance, a migrant may decide to send remittances because a female family member became unemployed or because she decided not to participate in the labor force. In this case, the effect of migration on female labor market outcomes cannot be determined by simply comparing females belonging to households with a migrant to females belonging to households without. In other words, running an ordinary least squares regression will yield biased estimates. The ideal method to account for self-selection and reverse causality is to randomly allocate individuals to migration. When such an allotment is not available, we must rely on quasi-experimental techniques.

The migrant population is not a random sample of the total population. Hence, we employ an IV approach using the three ELMPS waves (2006, 2012 and 2018). Accordingly, we estimate the following IV model:

First stage:

$$M_{ijt} = X_{ijt}\alpha + Z_{ijt}\beta + v_{ijt} \quad (1)$$

Second stage:

$$Y_{ijt} = X_{ijt}\vartheta + \widehat{M_{ijt}}\delta + e_{ijt} \quad (2)$$

Y_{ijt} reflects a battery of labor market outcomes, including working in a paid job, working in an unpaid job as part of a family business and engaging in subsistence work. X_{ijt} is a vector of

other, individual and community characteristics. To understand how the migration of a male member affects the labor market outcomes of WLB, the main independent variable M_{ijt} will turn on (= 1) if a woman lives in a household with a male migrant. In another specification, we restrict the sample to the migration population and M_{ijt} will turn on (= 1) if the household has a migrant that sent remittances in the last 12 months.

By interacting M_{ijt} with the number of years since departure, we also track how the labor market outcomes of WLB have evolved over time. To keep only the exogenous variations going from migration to labor market outcomes, we instrument migration (M_{ijt}) with the migration network (Z_{ijt}). The instrument is defined as the percentage of households that had international migrants in the household's region of residence six years before the corresponding analysis date. Migrants tend to establish an extensive information network to help relatives and friends migrate. This makes the average number of migrants in a district a good proxy for the regional migration network that is likely to be correlated with the migration decisions of male migrants living in the same region.

To construct this instrument, we use panel data from the ELMPS survey, which we also use for our main outcome variables. For example, to estimate the effect of migration on labor market outcomes in 2018, we use the weighted share of households with a male migrant at the *qism*[4] level from the 2012 wave as an instrument. Controlling for community characteristics makes sure that our instrument does not capture the effect of unobserved effects that may also be directly related to women's labor supply behaviors.

The IV approach requires the existence of an instrument that affects the migration decision but does not affect women's labor supply directly, other than through migration. Specifically, the

[4] The ELMPS data provides geographic disaggregation at the governorate (22 governorates), *qism* (40 *qisms*) and *shyakha* level (63 *shyakhas*). We chose to work at the *qism* level rather than the *shyakha* level because in some *shyakhas* only one respondent had been interviewed.

instrument must meet two important conditions: the relevance condition and the exclusion restriction assumption. We test the relevance condition in the empirical analysis section. Regarding the exclusion restriction, we argue that taking lagged values of the share of migrants in the community reduces the possibility of reverse causality. It is unlikely that the decision to supply labor in the present affects the decision to migrate of household members from the community six years before. Hence, the migration network formed six years earlier should affect the decision to participate in the labor market only through the male migrant within the household. This lag allows us to minimize potential contemporaneous correlation between migration and employment outcomes.

We use a longitudinal dataset and sound methodology to construct variables regarding the labor market outcomes of WLB and women's empowerment while addressing endogeneity. Thus, we run a probit model that will predict the probability of being a male migrant (see Angrist, 2014). By turning male migration from a dummy variable into a continuous variable, we can run the IV linear probability model without encountering the standard problem inherent in this model of predicted probabilities exceeding 1.

When detecting the channels, we look at women's empowerment indicators that reflect whether a woman has freedom of mobility, contributes to or makes decisions independently within the household, and has financial independence. We use the propensity matching technique to create a hypothetical control group with the same observable characteristics as the treatment household. Propensity score matching is a type of balancing score that represents the probability of being a treatment household, given the observed characteristics X that potentially affect the decision to migrate. Households with a migrant are then matched with a similar stayers' household, based on those scores.

We use three matching techniques to generate the average treatment effect on the treated: (i) nearest neighbor matching

(NNM), (ii) kernel density matching and (iii) bias-corrected NNM. Generally, if the different approaches give similar results, looking for the correct specification may be unimportant. Only if the results are drastically different should further investigations be made to reveal the source of disparity (Bryson et al., 2002).

An important condition for choosing the variables to be matched on, is that they must satisfy the conditional independence assumption. This condition requires that the outcome variable is independent of the treatment conditional on the propensity score. Hence, only variables that are unaffected by participation, or the anticipation of it, should be included in the model. We therefore match on variables that are fixed over time and are not even characteristics of the migrant himself. The data is matched over five variables: (i) the age of the female, (ii) the governorate where she resides, (iii) her education level, (iv) her marital status, and (v) the number of individuals living with her in the household.

Empirical results

Impact of migration and remittances on labor market outcomes

Table 3 presents our regression results using the probit model that does not account for self-selection (first column) and the 2SLS IV model (second column) for both rural and urban areas. Most of the estimates are consistent for both the probit and the 2SLS IV models. The probit model relies on the IV method estimating the local average treatment effect rather than the average treatment effect as the Wald test of exogeneity is statistically significant.[5] This implies that we need to treat migration as an exogenous regressor for all estimations.

The analysis of results shows that instrumenting for male migration enhances the effect on women's labor outcomes. It also suggests that women in rural areas decrease their wage work and increase their subsistence work and unpaid family work with the

[5] Results available on request.

migration of a male in the household. This increase in nonlabor market work offsets the decrease in wage work. On average, women who live in a male migrant's household are 31 percentage points less likely to engage in wage work than women in households without a male migrant. On the contrary, they are 48 and 76 percentage points more likely to engage in subsistence and unpaid work, respectively, than women in nonmigrant households.

Table 3: Impact of migration and remittances on labor market outcomes

	Urban		Rural	
	(1)	(2)	(3)	(4)
Panel A: Migration				
	Probit	2SLS IV	Probit	2SLS IV
Wage work	-0.189	-0.239	-0.253**	-0.312**
	(0.132)	(0.397)	(0.107)	(0.137)
Subsistence work	0.460***	0.184*	0.356***	0.485***
	(0.171)	(0.109)	(0.088)	(0.171)
Unpaid work	0.459***	0.424***	0.482***	0.762***
	(0.159)	(0.152)	(0.080)	(0.188)
Panel B: Remittances (migrants sending remittances versus nonmigrants)				
	Probit	2SLS IV	Probit	2SLS IV
Wage work	-0.608***	-0.337***	-0.467***	-0.188***
	(0.121)	(0.118)	(0.080)	(0.050)
Subsistence work	0.183	0.093**	0.166**	0.211***
	(0.147)	(0.042)	(0.068)	(0.062)
Unpaid work	0.222	0.051	0.288***	0.237***
	(0.136)	(0.035)	(0.058)	(0.066)
Controls	Yes	Yes	Yes	Yes
Year fixed effect	Yes	Yes	Yes	Yes
Cluster at household level	Yes	Yes	Yes	Yes

Source: Authors' calculations based on ELMPS dataset.

Impact of migration and remittances on women's empowerment

In urban areas, the 2SLS IV estimator indicates that, in response to male migration, WLB are 42 percentage points more likely to engage in unpaid work than nonmigrant households. They are also more likely to engage in subsistence work (+18 percentage points). In both the probit and 2SLS IV models, no significant difference is

observed between migrant and nonmigrant households in terms of market work. For the 2SLS IV estimators, the first stage F-statistic results suggest that the IV strongly predicts migration status.[6] The F-statistic is 69.69 in rural areas and 14.51 in urban areas for the overall sample, and 246.84 in rural areas and 64.941 in urban areas when the sample is restricted to households receiving remittances. These results indicate that our instrument may be less relevant in urban areas where the household's social network is less likely to be defined locally.

When comparing households with a male migrant who sends remittances to households without a migrant (Panel B, Table 3), we find that, generally, WLB reduce their wage work and increase their subsistence and unpaid work. There are notable differences between rural and urban areas. In urban areas, remittances have a statistically significant negative impact on wage work (–33.7 percentage points) and a small positive impact on subsistence work (+9.3 percentage points). In rural areas, the impact of remittances on wage work is much smaller than in urban areas (–18.8 percentage points compared to –33.7 percentage points). In addition, remittances have a stronger impact on subsistence and unpaid work in rural rather than urban areas. For example, only 9.3 percentage points of women increase their subsistence work as compared to 21.1 percentage points of their rural counterparts. The effect of remittances on unpaid work is not significant in urban areas and equals 23.7 percentage points in rural areas.

Table 4 displays the results of the impact of migration and remittances on women's empowerment. The analysis reveals that the migration of a male member of the household is associated with a higher level of empowerment for the WLB in urban areas. Both women living in rural and urban areas are less likely to ask their husband or another family member for permission when going out and are more likely to have personal savings than women living in nonmigrant households. While the migration of the male member makes urban WLB significantly more likely to

[6] Results available on request.

adopt empowering ideas and attitudes toward women, it does not have a similar significant effect on women in rural areas.

Table 4: Impact of migration and remittances on women's empowerment

Panel A: Migration as an independent variable						
	Propensity score		**Kernel matching**		**Bias corrected**	
	Urban	**Rural**	**Urban**	**Rural**	**Urban**	**Rural**
WDMH	0.073**	0.190***	0.075	0.184***	0.124***	0.228***
	(0.050)	(0.034)	(0.049)	(0.033)	(0.048)	(0.031)
WM	0.323***	0.091	0.336***	0.096	0.429***	0.167*
	(0.111)	(0.079)	(0.115)	(0.081)	(0.095)	(0.071)
PS	0.122***	0.162***	0.127***	0.162***	0.130***	0.166***
	(0.024)	(0.014)	(0.025)	(0.015)	(0.022)	(0.014)
Panel B: Remittances as an independent variable						
	Propensity score		**Kernel matching**		**Bias corrected**	
	Urban	**Rural**	**Urban**	**Rural**	**Urban**	**Rural**
WDMH	0.219***	0.254***	0.180***	0.259***	0.196***	0.312***
	(0.059)	(0.040)	(0.061)	(0.041)	(0.058)	(0.039)
WM	0.506***	0.247**	0.571***	0.270***	0.496***	0.301***
	(0.139)	(0.096)	(0.143)	(0.095)	(0.111)	(0.091)
PS	0.126***	0.213***	0.153***	0.204***	0.165***	0.207***
	(0.031)	(0.018)	(0.031)	(0.018)	(0.028)	(0.018)

Note: WDMH = women's decision-making in the household, WM = women's mobility, PS = personal savings.
Source: Authors' calculations based on ELMPS dataset.

One possible explanation could be that gender norms and values in rural areas are more deeply entrenched, making it more difficult for women to adopt empowering ideas and attitudes toward women, even if their male partners are not present. Additionally, the economic and social structures in rural areas may limit women's access to resources and opportunities, which could also contribute to the lack of significant effect on their work-life balance. Remittances amplify all coefficients on women's empowerment in both urban and rural areas, as compared to nonmigrant households.

Discussion and conclusion

Key findings

This study demonstrates the effect of the migration of a male member on the labor market outcomes and empowerment of WLB. We were particularly interested to see if such migration would provide leeway to WLB to participate in the labor market. Women in the MENA region are expected to join the labor market primarily to raise household income if the wealth or income of the breadwinner is not sufficient or the household has no male breadwinner (Amin & Al-Bassusi, 2004). Countering these needs is that women remain the primary caregivers in the household for children and the elderly (Assaad et al., 2017; Diprete et al., 2003; Hofferth & Collins, 2000; Selwaness & Krafft, 2021). They also engage in subsistence work, nonwage work or unpaid family work, which is typically home-based and does not require commuting, making it easier to cope with marital or caregiving responsibilities (Hendy, 2015; Krafft et al., 2019).

The international literature shows that, with the migration of a male member, particularly when he is the head of the household, WLB may be affected in three ways. The first is through the substitution effect: women may want to substitute labor work for nonpaid family or subsistence work to replace the absent family member. The second is through the income effect: women may supply more of their labor to the market to increase the family's resources. This happens mostly if the migrant was a breadwinner for the family but was unable to send any or enough remittances after migrating. Women may also participate in the labor market because they are able to outsource household chores to domestic servants as their financial situation improves with remittances. The third is through the new norms that the woman and her family may adopt from the migrant's country of destination. This refers to the so-called transfer of norms, which assumes that international migration drives norm changes in the origin countries. These norms may be progressive or regressive in terms of gender equality.

The concept of the transfer of norms in international migration suggests that the movement of people across borders can lead to changes in attitudes, beliefs and behaviors in the origin countries, including in relation to gender equality. This means that migration can potentially result in the adoption of more progressive norms, such as increased gender equality, or more regressive norms that perpetuate gender inequality.

Taking into consideration the endogeneity between migration, labor market outcomes and gender norms, we have tried to estimate the effect of male migration on WLB using three waves of the ELMPS. Our findings indicate the dominance of the substitution effect over the income effect for women in rural areas when we consider the whole sample of migrants and only those who send remittances. This confirms the argument that women in rural areas are more likely to assume the role played by the male migrant in subsistence work and unpaid family work. In urban areas, the income effect dominates the substitution effect only when we consider the sample including all migrants. However, when the migrant sends remittances, women in urban areas are less likely to engage in wage work and more in subsistence work.

These findings are inconsistent with Binzel and Assaad (2011), who show that remittances allow women to participate more in the labor market when their financial situation improves as they are better able to outsource household work to domestic servants. We argue that this inconsistency is related mainly to the timeframe adopted. Our study covers an epoque that saw important changes in the economic conditions in both sending and receiving countries. In the last decade, the Egyptian labor market has become tighter for women, particularly for those who must take care of children in the absence of the male head of the household. This could explain why WLB receiving remittances were less likely to work than their counterparts, since in all cases structural changes in the Egyptian labor market did not favor women: public jobs shrank and the private sector was unable to create enough suitable jobs for women (Assaad et al., 2017; Krafft & Kettle, 2019).

The results show that migration has a positive effect on women's empowerment. Women who live in households that have a male migrant have greater freedom to move, more personal savings and more women-empowering views and ideas than their female counterparts with no male migrant in the household. Our analysis is the first to use a panel dataset to explore the effect of migration on women's empowerment while men are still away. Samari (2021) has explored the same topic, but for return migrants and found that those returning from Arab countries brought back regressive and conservative patriarchal ideas.

We argue that our analysis complements Samari (2021) in that it shows that WLB assume a bigger role in household decision-making and managing its resources. However, this effect might not be long-lasting because it may diminish when the male migrant returns. It could be also that our results are driven by the use of a more recent dataset (ELMPS 2018), for a period during which many Arab countries started to prioritize women's empowerment in their reform and policy programs, as in Saudi Arabia. This could have had a positive effect on the norms brought back by male migrant workers. Exposure to a more progressive environment in the destination country can influence migrants' attitudes and behavior toward women, and they may bring back these more empowering norms to their home country. However, it is important to note that the transfer of norms is a complex and multifaceted process, and the extent to which these changes occur will depend on a range of contextual factors, including the broader cultural and social norms in the home country and the degree of support for women's empowerment within the migrant worker's community and social network.

Policy implications

Gender equality is a global development priority reflected in the current international framework. The 2030 Agenda for Sustainable Development (United Nations General Assembly, 2015) acknowledges the importance of gender equality in Sustainable Development Goal 5, and the Global Compact on Migration (United Nations General Assembly, 2018) calls for gender-responsive

approaches to migration governance. Egypt has been actively involved in the international process; it also has its own agenda to adopt and strengthen policies and legislation promoting gender equality and the empowerment of all women and girls.

The findings of this study lead to the following policy and program recommendations, which can inform stakeholders' decision making in the country. First, when developing policies or programs, stakeholders should be aware of the importance of spatiality. WLB in rural areas face specific challenges, and the impact of migration and remittances on their participation in the labor market and empowerment differ from that of their counterparts in urban areas.

Second, policies and programs need to incorporate the nonfinancial impact of migration—namely, social remittances—into decision-making related to the labor market participation of WLB in Egypt. Policies and programs need to consider how the transfer of norms and values from migrant workers to their families and communities of origin may affect the labor market participation of WLB. For example, migrant workers may bring back new ideas about gender roles and work-family balance, which could influence the aspirations and attitudes of WLB to work. Policies and programs may involve promoting more flexible work arrangements, providing access to childcare services, and addressing cultural and social barriers to women's labor force participation.

Finally, the temporality of the migration journey matters. The impact of migration and remittances while the migrant is away, is different from when the migrant returns. While the migrant is still away, remittances may provide a lifeline for the family left behind, helping to cover basic needs such as food, housing and education. On the other hand, once the migrant returns, the impact of migration and remittances may differ. During the migration period, policies and programs should focus on supporting the WLB by providing access to social services, such as healthcare, education and childcare. Governments and civil society organizations can work together to provide these services.

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Chapter 10

Women's decision-making autonomy in migrant versus nonmigrant households in Pakistan: Some insights for social remittances research

Nasra M. Shah and Samar Quddus

Introduction

Among the many factors that may have an impact on women's roles in the family, a husband's migration has been found to be an important one in various countries. Some studies show that women gain additional autonomy and decision-making power in the husband's absence (see Archambault, 2010; Ullah, 2017). Others show that decision-making power shifts to other influential members of the household, especially the mother-in-law or other male members (see Desai & Banerji, 2008; Iqbal et al., 2014). In other cases, the husband may continue to be the main decision maker via telephone or other forms of communication (Rashid, 2013). Furthermore, any autonomy gained during the husband's absence may not be permanent since this decision-making power may revert to him on his return (Lopez-Ekra et al., 2011).

Whether the women left behind perceive themselves as having gained autonomy in the husband's absence has mixed results. In some situations, the wife is satisfied (happy) with her ability to make additional independent decisions and is not keen to join him (Archambault, 2010). In other cases, she perceives her ability to shoulder additional responsibility as a burden (de Haas & Van Rooij, 2010).

Numerous studies emphasize that the impact of the husband's absence on the wife's empowerment is highly dependent on the context of migration and the latter's position in the family structure. Her level of autonomy—and change in it—may differ according to the structure of the family in terms of being nuclear or extended (Rashid, 2013). Even among those living in nuclear households, the activities of the left-behind women may be under surveillance by the husband's kin group, including his parents and other male members of the family. In the case of those residing in extended families, the role of the mother-in-law is especially important and often dictates how much autonomy the left-behind daughter-in-law may experience (Doss et al., 2022).

In terms of measurement, it has also been pointed out that women's agency, autonomy or empowerment are not unidimensional concepts. Mishra and Tripathi (2011) contend that it is very difficult to separate the various terms into operational categories in empirical research, and the terms are therefore used interchangeably in some cases. Efforts have been made to develop internationally comparable indices of women's empowerment by combining various dimensions. For example, using 15 different indicators, Ewerling et al. (2017) have developed an index comprising three major dimensions: attitudes to violence, social independence and decision making.

In some households, especially those with extended family living arrangements, it may be a member other than the currently married woman's husband who has left, is working overseas and sending financial remittances. In this case, it is probably more difficult to ascertain the impact of migration on the autonomy gained or lost by a left-behind woman who is not the migrant's wife. In this situation, it is likely that the migration of a male household member affects the social dynamics of the household members left behind in indirect ways. In addition to financial remittances, migrant households may be exposed to the ideas, values and norms of the host society, conveyed explicitly or implicitly through the migrant. In cases where the migrant is not the husband, but another relative, such as his older or younger

brother, the impact on women's autonomy is likely to be indirect and perhaps less pronounced.

Having a voice in decision making within the household has often been conceptualized as an important aspect of women's empowerment. The ability to make independent decisions in certain matters, such as healthcare and how to spend the husband's earnings, may also enable the woman to spend on matters that have received less priority otherwise. Her ability to decide whether she may visit family and friends is likely to enhance the social support needed by women left behind by their husbands. Her autonomy and ability to make independent decisions about her own health may also result in better health outcomes, as reported in earlier studies (see Mistry et al., 2009; Osamor & Grady, 2016).

Objective and methods

The main objective of this study was to analyze selected aspects of decision-making autonomy that women living in households with at least one international migrant enjoy (or experience) in comparison with those in households without any migrants. The ability to make independent decisions reflects one aspect of women's agency within the family. If living without any older women or men, a left-behind woman may become the household head, which is likely to increase her agency and capacity to make important decisions.

Our underlying hypothesis was that women living in migrant households demonstrate significantly different behaviors, reflecting greater autonomy, than those in nonmigrant households, controlling for differences in background characteristics. If we found differences between migrant and nonmigrant households (after controlling for important background characteristics), we would discuss the possible role that social remittances from migrants to the left-behind family (wife?) may have played in explaining such differences. Following Levitt (1998), we defined social remittances as the ideas, norms and values concerning women's role in decision

making within the family that are transmitted by the migrant to his wife and family. While we did not have any quantitative measures of social remittances from the survey data used in this chapter, we attempted to make some assessments as part of the qualitative data we collected, described later.

The study is based on data from the 2017/18 Pakistan Demographic and Health Survey (PDHS), which collects some information on overseas migration within the household. The PDHS is a nationally representative survey of 15,068 households. The sample includes ever-married women aged 15–49, of whom only currently married women were selected for this study. Our analysis was limited to 14,500 households with at least one currently married woman who was asked the survey's questions on decision making within the household. Of this sample, 1,422 households (9.8 percent) contained at least one overseas migrant who had left during the ten years prior to the survey and was still residing overseas; the remaining 13,078 households had no such migrants. Among migrant households, the emigrant was living in a Gulf country in 1,139 households and in a Western country in 283 households (80.1 and 19.9 percent, respectively).

The design of the survey did not enable us to assess the relationship between the migrant(s) and the left-behind women. However, it was reasonable to assume that, in cases where only one male member of the household was a migrant, the left-behind woman was likely to be his wife in several cases. In our sample, 7.7 percent (1,115) of households reported only one overseas migrant. Within this group, 45 percent of households had only one currently married woman. Thus, we believe that the migrant (male) was the currently married woman's husband in at least 45 percent of these households. In cases where the migrant male was not the husband but another member, the impact of migration on the wife left behind was likely to be more indirect, as mentioned earlier.

We looked at four different aspects of a woman's role in decision making in terms of (i) major household purchases, (ii) her health matters, (iii) her freedom to visit family and relatives, and (iv) decisions about how to spend her husband's earnings. The

survey questions on decision making provide four options and enquire whether the specified decision was usually made by the respondent alone, her husband alone, jointly by her and her husband, or by some other household member. We compared the decision-making patterns of women living in migrant households with those of women living in nonmigrant households.

After looking at the descriptive statistics, we analyzed respondents' ability to make each of the decisions above independently, using multivariate logistic regression. Each of the four decision-making variables were recoded as follows: respondent made the decision alone = 1 and all other decision-making categories = 0. Thus, women who reported being the usual decision makers in matters related to their health were coded as 1; women who made such decisions in consultation with their husband, or where these decisions were made by the husband or another household member, were coded as 0. Using this strategy, we were able to identify the maximum role that a women played in making specific decisions and compared these roles in migrant versus nonmigrant households.

To ascertain the net effect of migration on decision making among currently married women, we controlled for several socio-demographic characteristics of women, such as age, education level, husband's education level, age at marriage, number of living children, headship status and rural-urban residence. A variable to reflect the economic affluence or wealth of the household (and thereby of the individual woman) was also included.

The quantitative data was supplemented by qualitative interviews with 12 women living in households where the husband was an international migrant. These interviews were conducted by telephone. Women were identified with the help of the Migrant Resource Center in Lahore, which organizes workshops for groups of migrants, potential migrants and their families. Women were asked about their role in decision making regarding the four aspects on which survey data was available. They were also asked a general question about whether they

believed their husband's attitudes toward women's role in the household had changed after migrating, with a view to assessing the role that social remittances may have played in affecting female decision-making autonomy in migrant households.

The rest of this chapter is organized as follows. A brief overview of international migration from Pakistan is followed by our main findings, leading to the discussion and conclusions.

Migration from Pakistan: An overview

Pakistan has experienced different types of international migration during its 75-year history since its creation in 1947. A massive inflow of about 6 million lifetime migrants occurred as a result of the partition of the Indian Subcontinent. Historical outflows to the UK, the colonial ruler of this region, go back further than Partition. During the last four to five decades, a new type of temporary migration—motivated primarily by overseas employment opportunities in the Gulf region—has become very important for the country. It is estimated that about 8.4 million Pakistani nationals and those of Pakistani origin currently reside overseas, an estimated 53 percent of them in the Gulf. Other major destinations for Pakistanis include the US, the UK, Canada and various other countries (Shah et al., 2022).

Migration to Western countries is usually more permanent and involves the mobility of the whole family, with the spouse and children generally accompanying the migrant or joining him/her after a short interval. Such migration is also highly selective, involving relatively more skilled and educated Pakistanis. In the case of Gulf countries, on the contrary, a majority reside overseas as temporary migrant workers. It is estimated that most stay abroad for a relatively short period of about four to five years (Arif, 2009).

Only a minority are accompanied by their families since the host country has strict rules for the admission and stay of spouses and children, including a minimum salary below which family

visas are not issued. About half the migrants heading to the Gulf are unskilled or low-skilled workers and do not qualify for a family visa. Less than 10 percent belong to the highly skilled/qualified categories who would be eligible for a family visa. In addition, almost 99 percent of all migrants to the Gulf are male: unlike several other Asian countries, only a handful of females move to the Gulf region for employment. As a consequence of these patterns, a majority of the women whose husbands migrate to the Gulf are left behind and may experience salient changes in their role within the family, including those related to decision making about various aspects of life. Furthermore, the structural composition of the family may alter with more women taking up additional responsibilities and acting as the household head in some cases.

Results

Respondent characteristics

The characteristics of women living in migrant versus nonmigrant households are shown in Table 1. A larger percentage of women in migrant households were residing in rural households compared with those in nonmigrant households (58 and 51 percent, respectively). In terms of age, women living in migrant households were younger than those in nonmigrant households, the mean age of the two groups being 31.0 years and 32.2 years, respectively. About half of those in migrant households were under 30 compared with about 40 percent in nonmigrant households. The education level of women in migrant households was significantly higher than those in nonmigrant households, with 44 percent of those in migrant households having completed their secondary or higher education compared with 35 percent of women in nonmigrant households.

Table 1: Socio-demographic characteristics of women aged 15–49 years among migrant versus nonmigrant households

Background variables	N = 14,500		N = 1,422		N = 13,078	
Woman's characteristics	**Total**		**Migrant household**		**Nonmigrant household**	
	N	**%**	**N**	**%**	**N**	**%**
Residential area						
Urban	6,971	48.08	593	41.70	6,378	48.77
Rural	7,529	51.92	829	58.30	6,700	51.23
			p < 0.01 at 95% CI			
Woman's age						
Less than 24	2,912	20.08	323	22.71	2,589	19.80
25–29	3,076	21.21	386	27.14	2,690	20.57
30–34	2,774	19.13	268	18.85	2,506	19.16
35–39	2,614	18.03	188	13.22	2,426	18.55
40 or above	3,124	21.54	257	18.07	2,867	21.92
	μ = 32.11		μ = 31.033		μ = 32.23	
			p < 0.01 at 95% CI			
Education level of wife						
No education	7,313	50.43	605	42.55	6,708	51.29
Primary (fifth grade)	2,022	13.94	196	13.78	1,826	13.96
Secondary (tenth grade)	3,022	20.84	343	24.12	2,679	20.48
Above secondary	2,143	14.78	278	19.55	1,865	14.26
			p < 0.01 at 95% CI			
Wealth index quintiles						
Poorest	3,662	25.26	198	13.92	3,464	26.49
Poorer	3,115	21.48	246	17.30	2,869	21.94
Middle	2,726	18.80	290	20.39	2,436	18.63
Richer	2,475	17.07	279	19.62	2,196	16.79
Richest	2,522	17.39	409	28.76	2,113	16.16
			p < 0.01 at 95% CI			
Number of living children						
0	1,968	13.57	223	15.68	1,745	13.34
1	2,037	14.05	260	18.28	1,777	13.59
2	2,406	16.59	256	18.00	2,150	16.44
3	2,384	16.44	224	15.75	2,160	16.52
4	2,075	14.31	184	12.94	1,891	14.46
5 or above	3,630	25.03	275	19.34	3,355	25.65
	μ = 3.1		μ = 2.70		μ = 3.14	
			p < 0.01 at 95% CI			
Gender of household head						
Male	13,091	90.28	1,041	73.21	12,050	92.14
Female	1,409	9.72	381	26.79	1,028	7.86
			p < 0.01 at 95% CI			

Source: Authors' calculations.

Women in migrant households therefore had a higher socioeconomic status than women in nonmigrant households. This finding is supported by the wealth status distribution in the two types of households. About 48 percent of women in migrant households belonged to the top two quintiles representing the richer or richest groups, while only 33 percent in nonmigrant households belonged to these groups. As a likely result of age and education differences between women in migrant and nonmigrant households, fertility was lower in the former: the average number of living children was 2.7 in the former and 3.1 in the latter.

Finally, in terms of the gender of the household head, a marked difference was evident between women living in migrant and nonmigrant households: about 27 percent of heads in migrant households were female compared with only 8 percent in nonmigrant households. It appears that the process of migration is related to compositional changes in family structure: in the absence of the male migrant, a larger percentage of women take up the role of the household head. This role may result in women's empowerment in terms of making important decisions, as discussed later.

Women's role in decision making

Table 2 analyzes women's decision-making role in migrant and nonmigrant households in terms of making large household purchases, spending the husband's earnings, visiting family and friends, and making decisions about their own healthcare. Four broad conclusions can be drawn from this analysis. First, a significantly larger percentage of women in migrant (compared to nonmigrant) households said they were the sole decision maker in each of the situations above. Second, the husband's role in decision making declined substantially in all four situations among migrant households. Third, in the absence of the husband, joint decision-making by the couple also declined substantially. Fourth, other members of the family gained considerable decision-making power in the absence of the migrant.

The decision-making autonomy gained by women in migrant households differed according to the aspect that was addressed. For example, about 22 percent of women in migrant households stated that they were the sole decision maker in matters relating to their own healthcare compared with only 8 percent in nonmigrant households. On the other hand, their role in decisions regarding large household purchases was less salient: about 11 percent of women in migrant households were the sole decision maker in this matter compared with only 5 percent in nonmigrant households. Therefore, it should be recognized that women's role in decision making may differ according to various aspects of a couple's life.

After looking at the bivariate analysis presented in Table 2, we investigated whether residence in a migrant versus nonmigrant household remained a significant factor in women's decision-making autonomy as the sole decision maker, after controlling for her background characteristics using multivariate logistic regression. The results of this analysis are shown in Table 3. We found that the net effect of living in a migrant household on women's decision-making autonomy was positive. Compared with those living in nonmigrant households, women in migrant households were 1.5 times more likely to be the sole decision maker when making large household purchases and 2.3 times more likely in terms of spending their husband's earnings.

Female headship status was a highly significant factor in enhancing female autonomy, controlling for background characteristics. For example, a female household head was 6.7 times more likely to be the sole decision maker in terms of how to spend her husband's earnings (probably received as remittances) and 6.4 times more likely for decisions regarding large household purchases. She was also 5.7 times more likely to make independent decisions concerning her healthcare and 4.2 times more likely to make decisions about visiting family and friends.

Table 2: Descriptive statistics for women's autonomy in decision making among migrant versus nonmigrant households

Outcome variables	**N = 14,500**		**N = 1,422**		**N = 13,078**	
Woman's empowerment status	**Total**		**Migrant household**		**Nonmigrant household**	
	N	**%**	**N**	**%**	**N**	**%**
Person who usually decides on large household purchases						
Woman alone	861	5.94	162	11.39	699	5.34
Husband alone	5,517	38.05	320	22.50	5,197	39.74
Woman/husband jointly	5,151	35.52	329	23.14	4,822	36.87
Other family member	2,971	20.49	611	42.97	2,360	18.05
			$p < 0.01$ at 95% CI			
Person who usually decides on visiting family and friends						
Woman alone	1,427	9.84	235	16.53	1,192	9.12
Husband alone	5,339	36.82	322	22.64	5,017	38.37
Woman/husband jointly	5,305	36.59	332	23.35	4,973	38.03
Other family member	2,428	16.75	533	37.48	1,895	14.49
			$p < 0.01$ at 95% CI			
Person who usually decides on woman's healthcare						
Woman alone	1,399	9.65	307	21.59	1,092	8.35
Husband alone	5,802	40.01	371	26.09	5,431	41.53
Woman/husband jointly	5,594	38.58	341	23.98	5,253	40.17
Other family member	1,705	11.76	403	28.34	1,302	9.96
			$p < 0.01$ at 95% CI			
Person who usually decides on spending husband's earnings	N = 13,873*		N = 1,351**		N = 12,522*	
Woman alone	898	6.47	215	15.91	683	5.45
Husband alone	6,186	44.59	419	31.01	5,767	46.05
Woman/husband jointly	5,263	37.94	342	25.31	4,921	39.30
Other family member	1,526	11.00	375	27.76	1,151	9.19
			$p < 0.01$ at 95% CI			

* p-value shows the results for chi-square tests.
** number of observations dropped on account of respondents whose husbands do not earn.
Source: Authors' calculations.

Table 3: Odd ratio estimates from logistic regressions for women's decision-making autonomy in migrant versus nonmigrant households

Dependent variables	N	Period 2017/18			
		Odd ratios (OR)			
		Person who usually decides on large household purchases	Person who usually decides on visiting family and friends	Person who usually decides on woman's healthcare	Person who usually decides on spending husband's earnings
		Woman only = 1 Someone else = 0			
Explanatory variables					
Household migrant status					
Nonmigrant (ref.)	13,078	1	1	1	1
Migrant	1,422	1.551**	1.531**	2.272**	2.311**
Gender of household head					
Male (ref.)	13,091	1	1	1	1
Female	1,409	6.371**	4.247**	5.652**	6.747**
Woman's age					
Less than 24	2,912	1	1	1	1
25–29	3,076	1.423*	1.304*	1.177	1.145
30–34	2,774	2.263**	1.961**	1.595**	1.597**
35–39	2,614	2.605**	2.352**	2.141**	2.314**
40 or above	3,124	4.783**	3.647**	3.347**	3.051**
Number of living children					
0 (ref.)	1,968	1	1	1	1
1	2,037	1.921**	1.441**	1.647**	1.486*
2	2,406	1.945**	1.669**	1.666**	1.898**
3	2,384	2.023**	1.744**	1.654**	1.927**
4	2,075	2.391**	1.845**	1.829**	2.152**
5 or above	3,630	1.904**	1.523**	1.511**	1.910**
Education level of wife					
No education (ref.)	7,313	1	1	1	1
Primary	2,022	1.613**	1.302**	1.368**	1.253*
Secondary	3,022	1.511**	1.514**	1.433**	1.192*
Above secondary	2,143	1.517**	1.804**	1.680**	1.026

Table cont.

Dependent variables	N	Period 2017/18			
		Odd ratios (OR)			
		Person who usually decides on large household purchases	Person who usually decides on visiting family and friends	Person who usually decides on woman's healthcare	Person who usually decides on spending husband's earnings
		Woman only = 1 Someone else = 0			
Residential area					
Urban (ref.)	6,971	1	1	1	1
Rural	7,529	0.762*	0.819	0.814*	0.738**
Wealth index quintiles					
Poorest (ref.)	3,662	1	1	1	1
Poorer	3,115	1.201	1.259*	1.123	1.046
Middle	2,726	1.64	1.162	1.213	1.307**
Richer	2,475	1.166	1.155	1.094	1.181**
Richest	2,522	0.972	0.987	0.089	1.106
N		14,500	14,499	14,500	13873
Cons_		0.007516	0.020700	0.020217	0.01237

Source: Authors' calculations.

Women's age was another major factor in increasing female autonomy in decision making (Table 3). For each type of decision, the likelihood that the woman was the main decision-maker increased linearly with increases in the respondent's age. For example, women aged 40 or above were 4.8 times more likely to make decisions about large household purchases, while those aged 25–29 were 1.4 times more likely to do so in comparison with those under 24. Similar patterns in decision making by older women were evident in the case of other decisions such as visiting family and friends, seeking healthcare and spending the husband's earnings.

Women's parity level was also positively associated with their decision-making autonomy. Women who had borne one or more children were more likely to express higher autonomy compared with childless women. However, the differences according to the increasing level of parity were generally small.

Those at very high levels of parity with five or more children had somewhat lower autonomy than those at lower levels.

A positive association was evident between women's education level and their decision-making autonomy. Relative to uneducated women, those who had attained more than secondary education (studied more than 10 grades) were significantly more likely to be the main decision makers in terms of making large household purchases, visiting family and relatives or obtaining healthcare. Controlling for background characteristics, the family's wealth status did not appear to be a significant correlate of women's decision-making autonomy.

Women in rural areas were consistently less likely to express an ability to make independent decisions about each of the four aspects addressed. For example, rural women were about 72 percent less likely to say they could make independent decisions concerning large household purchases relative to urban women.

Insights from qualitative interviews

To gain a deeper understanding of the results of the quantitative survey, we conducted telephone interviews with 12 women whose husbands were migrants. We asked the same questions as posed in the PDHS 2017/18 regarding women's role in making decisions about the four aspects addressed above.

Among the interviewed women, 11 husbands were Gulf migrants and one was currently in Italy. The duration for which the husband had been away varied from about six months to more than 10 years. The migrant in Italy had gone overseas through illegal channels. He had been away for eight years continuously, the first three years spent in Turkey. He was able to find work and consistently send back remittances to sustain the family.

Among the 12 households, nine women lived in extended families while three lived in separate households where they were the household heads. Two of these three women lived separately but near their husband's family. The mother-in-law was the household head in most of the extended families and the father-

in-law had passed away. Among the sample of 12 women, only one was uneducated while the rest had completed between about four grades of school and a college undergraduate degree. Only one woman was employed in the formal sector as a health worker. Two women had memorized the Quran or were *hafiza*. One of them taught the Quran to children at home while the other gave religious lectures on invitation.

Women's participation in decision making varied across the 12 households. The only left-behind woman who was the sole decision maker in all four aspects was the one employed as a health worker and living separately from the extended family. Her husband had been away in Saudi Arabia for about ten years, visiting periodically. In the case of another woman who was living separately, it was she who made decisions about her own health, major household purchases and how to spend her husband's earnings. However, she consulted him on decisions with regard to visiting her family and friends. Among the three women who were living on their own, the role of other members of the extended family, even if living in adjacent households, did not seem to carry much weight.

In the case of women who were living in extended families with their husband's parents and siblings, the left-behind woman's decision-making autonomy seemed to be highly dependent on other persons. One woman reported that all major decisions were made by her husband's older brother or her mother-in-law, without whose approval she could not make any decisions. The role of the mother-in-law appeared to gain additional salience where the father-in-law had passed away and the former was now considered the head of the household. According to one woman who had been married four years and whose husband was a driver in Saudi Arabia, she could not make any decision on her own. She reported:

> In our home, all major decisions are made in consultation with my mother-in-law; we cannot do anything without her approval. I must ask her permission and cannot decide things on my own.

Another woman living with several of her husband's relatives, including his father, mother and married brothers and their families, stated:

> Women in the household don't interfere in decisions about major purchases; I must seek the permission of my mother-in-law and my husband to visit my family and relatives.

An older woman whose husband had worked in Dubai as a cook for 17 years and was now back in Pakistan and sick, said she made most of the decisions in consultation with other household members. Her situation had changed after her mother-in-law—who used to make all the decisions for the family—died three years ago. In the mother-in-law's presence in the household, the respondent had had very little role in decision making. Now, with her husband's illness and mother-in-law's death, she found herself making key decisions.

A woman who had memorized the Quran and taught children at home said she would have liked to work and use her skills more, but the husband's family was very strict and did not allow women to work outside the home. All major decisions in the household were made by her husband's older brother; she did not play a major role in this.

In terms of the account to which money was sent by the husband, we found a mixed picture. In some cases, the respondent and her mother-in-law had joint bank accounts. In other cases, the money came to the wife's account or another person's account. It was, however, generally disbursed in consultation with the husband and other members of the household.

We tried to assess women's opinion of whether their husband's attitude to the wife's role in decision making—or generally about women's education—had changed after migrating overseas. Our question was generally not well-understood and women gave broad responses such as 'he was very strict earlier but has become more relaxed' or 'he has always

approved of girls' education.' One respondent said that her husband did not want to bother with day-to-day decisions and said the family should decide, given the circumstances.

One respondent, a college graduate whose husband had been away for seven years in Malaysia and Dubai, reported that his views regarding their lifestyle had changed and 'matured'. She stated that:

> My husband wants us to drink tea in mugs rather than cups and saucers. He also wants us to serve good bakery items to guests instead of the cheaper packed biscuits such as Sooper. He also emphasizes timely maintenance of the house, such as changing lightbulbs when fused.

Our qualitative interviews with left-behind wives helped us reach a deeper understanding of the results yielded by the quantitative analysis of the household survey. Household composition, especially in terms of headship, was a key determinant of greater decision-making power held by currently married women, supported by both analyses. Women living in joint families reported lower ability to make independent decisions than those living separately from their husband's family, thereby taking on the role of the household head.

While the PDHS 2017/18 does not provide information on the type of family (nuclear versus extended), the data from our qualitative interviews showed that, in extended households, the mother-in-law's role appeared to be especially salient and took on increased significance in cases where she was reported as the household head. Widows living with their children are usually considered household heads in Pakistan and are reported as such in household surveys. The mother holds a venerated position in the family and the daughter-in-law is expected to defer to her in most matters, including the decisions analyzed in this study. Thus, in the case of migrant households, the decision-making power seems to shift from the husband to 'other' members of the family, the mother-in-law being a central one.

Discussion

We compared the decision-making autonomy of women residing in households with at least one international migrant with women living in households without any migrant. To this end, data from the PDHS 2017/18 was analyzed, supplemented by 12 qualitative interviews with women whose husbands were currently employed overseas, primarily in the oil-rich Gulf countries. Our questions related to decisions concerning the woman's own health, making large purchases, spending the husband's earnings, and visiting her family and friends. The respondent was asked whether she made each of these decisions herself or in consultation with her husband, or whether she played no part in decision making because the husband or another family member made these decisions.

While the data does not allow us to draw a definitive conclusion about the relationship between the migrant and the left-behind woman, we can assume that at least 45 percent of the migrant households surveyed, consisted of couples where the wife of the migrant husband had been interviewed. Controlling for their major background characteristics, women living in migrant households were significantly more likely to report that they were the sole decision maker for each of the four decisions investigated.

Regarding decisions about visiting family and friends, women from migrant households were 2.5 times more likely to make this decision independently. They were also more likely ($OR = 2.3$, $p < 0.01$) to express their ability to decide how to spend the husband's earnings. This implies that such women had greater capacity to undertake expenditure on important factors that could raise the household's quality of life. Previous research from many countries shows a positive association between the husband's migration and women's decision-making autonomy. Based on secondary data for Ethiopia, for instance, Matz and Mbaye (2017) report that male migration gives women the opportunity to become more autonomous. Similar results indicating the strong positive impact of male migration on women's autonomy are

reported by Shwe et al. (2020) for rural Myanmar and by Yabiku et al. (2010) for Mozambique.

Among all the variables included in our analysis, female headship was the most significant; female heads reported that they were 6.8 times more likely to be the sole decision maker on how to spend the husband's earnings and 5.7 times more likely to make decisions about their own health. Female headship is not the usual living arrangement in Pakistan, with only about 10 percent of women reported as household heads in the PDHS 2017/18. However, migrant and nonmigrant households differed substantially, with 27 percent of the former reporting a female head compared with only 8 percent of the latter.

The husband's migration appears to bring about a social change in the family structure through the wife taking on the role of the household head, which in turn gives her greater decision-making autonomy. Our results are similar to those reported by Desai and Banerji (2008) for Indian women for whom household structure was the key mediating factor through which husbands' absence affected women. They found that women who did not live in extended families faced greater responsibilities but also greater autonomy, while those in extended households did not experience these demands or benefits. While we did not have any data on increased responsibilities, we found that women were the main decision makers in households where they lived separately from their in-laws.

Consistent with our findings, headship was also found to be positively associated with increased autonomy among left-behind women in migrant households in Nepal (Rajkarnikar, 2020). Our findings were also similar to those of a study by de Haas and Van Rooij (2010) of a Moroccan village in which women living in nuclear migrant households tended to have more control over their husbands' earnings than wives living in nonmigrant households, and decided independently how to use the remittances that husbands sent home. A mixed-methods study in Nepal found that wives in nuclear households were more empowered if their husband was a migrant. Despite a possibly

higher workload, they also had more control over agricultural production and income (Doss et al., 2022).

Previous research from Pakistan shows that female headship is related positively to women's empowerment and autonomy, regardless of whether there are any migrant males in the household (Abbas et al., 2021). However, a qualitative study from Gujrat, Pakistan, showed that, in the case of migrant households, major decisions were often made by the male members of the household and rarely by the women alone (Iqbal et al., 2014). Another study from rural southern Punjab, which looked at the decision-making power of women in households where the husband had migrated to the city found that, in the absence of her migrant husband, a woman left behind is still subject to patriarchal norms and surveillance by the remaining in-laws, including other women. However, she is subtly able to negotiate and bargain her positionality without disturbing the status quo of a patriarchal hierarchy in power relations (Ahmed, 2020).

In addition to the household's migrant status and female headship, higher age and parity were significantly associated with greater female autonomy in our study. Women aged 40 or more were 4.7 times more likely to make independent decisions on large household purchases than women aged less than 25, and 3.6 times more likely to decide about visiting family or friends. As women grow older and become mothers, they gain greater social status according to cultural norms in Pakistan. Similar results were reported for Pakistan by Abbas et al. (2021).

Residence in urban areas was a positive factor in increased women's autonomy, controlling for other factors. The respondent's own education also played a significant positive role in contributing to women's autonomy, similar to the findings reported by Abbas et al. (2021) as well as Sathar and Kazi (2000). Thus, investment in women's education can play a direct role in empowering women in terms of their ability to make important decisions that may benefit different aspects of their life.

The gain in autonomy resulting from the husband's absence found in our study may not be a permanent feature in women's

lives in Pakistan. In the case of Moroccan women, migrant husbands reassumed their earlier position as family patriarchs when they returned (de Haas & Van Rooij, 2010). Desai and Banerji (2008) also note that, in terms of gendered division of labor where women take on additional responsibilities during their migrant husband's absence, families return to a patriarchal division of labor once they reunite. Similar results were reported by Rashid (2013) for Bangladeshi women with migrant husbands, who wielded considerable decision-making power even when they were away.

Male migration may in fact have a negative impact on female autonomy as reported by Tuccio and Wahba (2015) in the case of Jordanian households that had a return migrant. They found that women had internalized a higher level of gender-discriminatory norms than women in households with no return migrants, and argued that the main reason for this negative impact was that the migrants had gone to conservative traditional Arab societies and brought back such norms. A study on migrants from Cairo to the Gulf also points out that male migration tends to strengthen rather than weaken traditional gender ideologies (Hoodfar, 1996). Since most Pakistani male migrants go to the Gulf countries, which have historically followed conservative gender norms, future studies should explore the impact of the migrant's destination on women's decision-making autonomy and empowerment.

Whether left-behind women in Pakistan find the additional autonomy they gain (on becoming the household head) a burden or an improvement in their quality of life remains a question for the future. The PDHS 2017/18 did not include any questions that could shed light on this issue. Previous research from a Moroccan village shows that women may find their gain in autonomy to be a burden rather than a liberating factor, especially if they have had to take over the husband's responsibilities. The doubling of responsibilities can prove to be a source of social and psychological stress (de Haas & Van Rooij, 2010).

Similarly, in a study of a farming community in southeastern Mexico, McEvoy (2008) found that women with migrant

husbands acquired new roles, but felt more 'uncomfortable' than empowered by these roles. In contrast to the Moroccan situation, women in rural Ugweno, Tanzania, reported that staying behind while their husbands worked in the city was an empowering strategy that offered women farmers a degree of economic autonomy and social wellbeing that they may not have found elsewhere (Archambault, 2010). In this case, access to land and control over productive resources, combined with strong social networks, led to a preference for residing in Ugweno.

The greater autonomy of women has been theorized as a positive force in improving the status of women and bringing about positive social changes. Higher autonomy has been reported to have significant impacts on reducing fertility, improving maternal health and raising the health and education levels of children (see Bloom et al., 2001; Dyson & Moore, 1983; Sathar et al., 1988; Abadian, 1996). Several studies, cited above, indicate that male migration plays a positive role in enhancing women's autonomy.

There are exceptions to the findings above, however. In some cases, the husband's migration does not improve women's status and instead reinforces gender inequality, as reported by Menjívar and Agadjanian (2007) for rural Mexico. The husband's absence may also simply shift the control over women to other male members of the household or to the mother-in-law. We also found that our respondents frequently depended on other members of the household rather than making independent decisions. The key factor that seemed to increase their autonomy was their position as household head. The net impact of women's autonomy on household wellbeing and welfare in migrant versus nonmigrant households in Pakistan remains to be explored.

One of our objectives was to explore whether social remittances by the migrant played a part in the decision-making role of the wife observed by us. Since the PDHS 2017/18 did not provide any quantitative data to enable such analysis, we made an attempt in qualitative interviews with the left-behind wife to assess whether the husband's attitudes to her role in decision

making had changed after he migrated. Although this was framed as a simple question, it was generally not well-understood and most women provided broad answers that cannot be interpreted as social remittances.

It should be recognized that a majority of male migrants go to the Gulf countries on a temporary basis and are employed in relatively low-skilled occupations. Most live in accommodation that is segregated from the host country nationals, affording little exposure to the norms and values of the host country in terms of family life and women's autonomy. In this sense, most Pakistani male migrants to the Gulf countries would have little chance to observe the interaction among Gulf couples. Those migrants who work as drivers, cooks or caretakers in citizens' homes may be some exceptions to the above.

It should also be recognized that women's role in the Gulf countries is changing, with greater participation by national as well as migrant women in public life, where they interact with migrant males. This in turn may affect the male migrant's perception of 'appropriate' roles and autonomy of women, transmitted back to the home country. Conclusions about the possible role that social remittances by husbands could play in the decision-making autonomy of women left behind in Pakistan requires considerably more research, however.

Our study has some limitations. The survey data did not enable us to conclude with certainty whether the migrant was in fact the husband of the currently married woman interviewed in that household. Nor did the PDHS 2017/18 provide any variable that summarized the family type as nuclear or extended. The strong impact of female headship on women's decision-making autonomy suggests that better indicators of family structure are necessary to fully understand the dynamics that lead to increasing women's autonomy. Despite these limitations, it must be acknowledged that the PDHS 2017/18 is among the rare surveys that enable an analysis of women's position and changes in it in migrant versus nonmigrant households in Pakistan. Including additional variables on family structure as well as the interaction

between the migrant and the left-behind wife pertaining to host country norms, values and behaviors would allow us to better analyze the processes that affect social change in the family, including women's autonomy.

Conclusions

A comparison of female decision-making autonomy in migrant versus nonmigrant households showed that the migration of a male member was an empowering factor for the women left behind. Our analysis used quantitative data from the PDHS 2017/18, supplemented by 12 qualitative interviews with women whose husbands were currently overseas. We found that currently married women in migrant households were significantly more likely than those in nonmigrant households to make independent decisions about large household purchases, visits to family and friends, their own health matters, and spending the husband's income.

In addition to enabling the left-behind women to make such decisions, a simultaneous shift from the husband to other members of the family also occurred. Qualitative interviews revealed that the mother-in-law was an especially important person in the decision-making process among other members of the household. In cases where the respondent was not the sole decision maker, the husband's brothers and the mother-in-law played key roles. This upheld the patriarchal structures found in Pakistani society, which were reinforced in the husband's absence.

Family structure, especially in terms of the gender of the household head, differed significantly between migrant and nonmigrant households, with 27 percent of female heads in the former and 8 percent in the latter. Female headship was a key variable in enhancing women's decision-making power. After controlling for several socioeconomic variables and the household's migrant status, women in female-headed households were six to seven times more likely to be the sole decision maker in the areas addressed in this chapter.

Whether the increased autonomy of women, aided by male migration, plays a positive role in household welfare in terms of better health and education outcomes should be investigated in future research. Household surveys as well as qualitative studies should incorporate variables that may enable a deeper understanding of the social changes brought about by male migration, not only in terms of the financial but also the social remittances that are sent back. Questions to measure the ideas, values and norms that migrants absorb from their host country and transmit to their families in the home country should be developed and incorporated in migration surveys.

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