

4.3 Cultural, social, and political remittances

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The link between migration and development in countries of origin has always been at the core of research and of policy-making.

The role of financial remittances and the way they are used in developing economies has been carefully studied to understand the allocation of money sent home, which type of allocation provides the best returns on remittances for migrant families and for the local community, and how remittances favor growth and development. Monetary remittances also help spur financial literacy, which can transform workers into entrepreneurs and which favors development. They additionally contribute to changing the role of women in society because women frequently become the family's money manager and they acquire higher relative power within the family and society.

Monetary remittances can be reinforced by return migrants who bring back money and professional human capital. History has shown that the effects of both monetary and human capital remittances can be very positive for the country of origin but that the effects are strongly related to the level of economic and social development in the areas in question. According to Cerase (1967; 1974), in the 1960s and 1970s migrants returning from the U.S. to southern Italy were treated by their fellows as 'Americans' and were even cheated by extended family members. The local administration was unhelpful, sometimes hostile, and it was impossible to buy land and get permission to start up an activity. A very different experience met Italian migrants returning to their homes in the north east, where both the administration and the local productive system, which were much more dynamic than in the south of the peninsula, were taking advantage of returned financial and human capital. The narrative of migrants coming back from America and bringing with them a new way of life is described in many novels and films. They brought different clothes, different food and different modes of behavior. Women were more independent. Returning migrants became, in fact, agents of change.¹

Reserachers have tried to better understand the effects of migration on the origin country. There has been an attempt to understand what makes a move successful, not just for the individual family, but for society as a whole. In addition to the monetary remittances migrants bring back other remittances that are more difficult to measure and quantify. When they return for holidays or when they come back for a longer period they bring with them foreign goods, yet also different values, culture, etc. The new model of lifestyle sometimes only lasts for a short time because migrants, after a while, return to their previous lifestyle. But as Cerase points out, it depends upon the receptivity of the community and the capacity of migrants to permeate it.

Box 4.3.1 Definition

Peggy Lewitt (1998) coined the term "social remittances" to define the diffusion of ideas, values, beliefs, norms of behavior, practices, and social capital.

Since then social remittances have been understood as non-financial assets acquired as a result of migration and eventually transferred to others, usually the home regions of migrants.

¹ For a European analysis and a theoretical approach, see Grabowska et al. (2017).

In the title of this section we refer to cultural, social, and political remittances to point out the broader dimensions of the concept and the areas where more research has been carried out.

Three conditions are necessary for the transfer: first, the migrant has to adopt different behavior and to understand and like the alternative way of organizing society that is prevalent in the destination country; second, he or she has to bring back home these differing ways of life; and third, the home society – meaning family, civil society, and institutions – has to be ready for a change. Grabowska et al. (2017) define the phases as acquisition, transfer, and outcomes, and finally their diffusion.

The first point is not automatic: the more the community in the destination country is open the more it is permeated by the destination country's values, while instead, the more it is closed, the more it tends to keep the values prevailing in the origin countries at the time of departure. Here it is enough to think of Little Italy or China Town in New York, which halted all cultural updates at the time of departure. More recently there has been empirical research on assimilation that demonstrates the negative role played by large communities on wages and on the probability of exiting from ethnic jobs.²

The last point, diffusion, is also an important component that should not be taken for granted. As Grabowska et al. (2017) note, the origin society can resist, imitate, or innovate.

The scale of change in the country of origin with respect to monetary remittances depends on three different factors: the size of the migrant population versus the **local one**; migrant characteristics versus the structure of the society by educational level and social class; and the duration of migration, be it temporary or permanent (OECD 2017).

Changes can also be worked by the diaspora abroad, which has many ways to keep in contact and to transfer innovative social behavior. The transnational space is at the center of symbolic exchanges that do not necessarily go together with financial and goods-and-services exchanges.

The society of the origin country, in general, receives a lot of diverse cultural stimuli from various sources. Consider, for instance, the educational policies adopted by large countries or large religious communities that build schools or universities around the world. In this way they affect the educational models and values of faraway countries. Notable examples, just to name a few, are the global American universities, the Alliance Française, Spanish universities and the Goethe Institutes. In 2007 the European Commission proposed a European Agenda for Culture in a globalizing world favoring economic and social–political development.³ Again **in 2015, the European Council⁴ asked** the European Commission and the High Representative for Foreign Affairs and Security Policy to prepare “a strategic approach to culture in external relations” to pursue peace and multiculturalism. And “cultural diplomacy” has recently received the attention of the High Representative/Vice-President Federica Mogherini as a form of support and assistance that the EU can provide to third countries.⁵

² See for instance Hatton and Leigh (2011) and Strom et al. (2013).

³ See the European Commission's (2007) Communication on a “European Agenda for Culture in a globalizing world”; see also the Council Conclusions on the promotion of cultural diversity and intercultural dialogue in external relations, Council of the European Union (2008).

⁴ **Outcome of 3428 Council Meeting: Education Youth Culture and Sport, 23-4 Nov 2015 and see also 2014 EP Preparatory Action 'Culture in EU external relations' <http://cultureinexternalrelations.eu/>.**

⁵ On this subject, see the mimeo by Lanati and Venturini (2017) on “Imports of cultural goods and migration: An unexplored relation”.

Migrants, however, acting within the close and extended family play a very important role in opening up a society to new values, by gaining the trust of people who are difficult to reach and who anyhow might prove diffident about accepting novelties.

Sociological, anthropological, and economic research has looked a great deal at how migrants affect the values and culture of the origin country. Sociologists have focused on understanding the mechanism, the dynamics of the cultural transition, the reaction and the support for social innovation, while economists have attempted mainly to show that relationships exist and their causality. Although not a comprehensive survey, below we provide three examples of the effects of migration: the fertility decision within the migrants' families at home in the origin country, women's empowerment, and political remittances affecting home-country institutions.

4.3.1 Fertility

Cultural transfer can affect many spheres of individual and personal life. These include family life and the different values affecting consumption patterns, the roles played by women in the couple, the education of children, and also the fertility decision. In a broader perspective these dimensions will affect population growth, encourage the empowerment of women, and strengthen democratic values.

For a long time, the population transition, namely the link between very high fertility rates and the stationarity value (two children per woman), was studied, analyzing the effects of economic growth (Malthus effect), women's education, age at marriage, and how these variables were also affected by migration.

Box 4.3.2 Fertility trend in Egypt

Philippe Fargues, in his pioneering work (1994; 1997) studied Egyptian fertility and its evolution according to the traditional driving factors: wealth, women's education, and age at marriage. He also looked at the importance of different political regimes, which in the 1960s had already institutionalized fertility control. The correlation of the fertility rate with this policy – which started with the socialist regime of President Gamal Abdel Nasser (1952–70), but which also continued with the liberal regime of Anwar Sadat (1971–82) and with that of Hosni Mubarak (1982–2011) – seemed erratic and not even especially aligned with the model proposed in various political phases. The decrease of fertility under Nasser was reverted by an increase in fertility in the 1970s. This change was explained by the end of the war with Israel, the liberalization of the economy (which attracted foreign investment), and also by mass migration abroad, which had previously been forbidden. As the recession started in 1984, fertility declined but not as expected. Other social values acquired from abroad reinforced the norm of a large family and affected the decision to have more children. As shown in Figure 4.3.1, those Egyptian areas with more migrants to the Gulf countries had a higher fertility rate and were much more distant from the transition value.

Figure 4.3.1 Emigration to the Gulf and the transition of fertility in Egypt at the time of the Gulf war (1991)

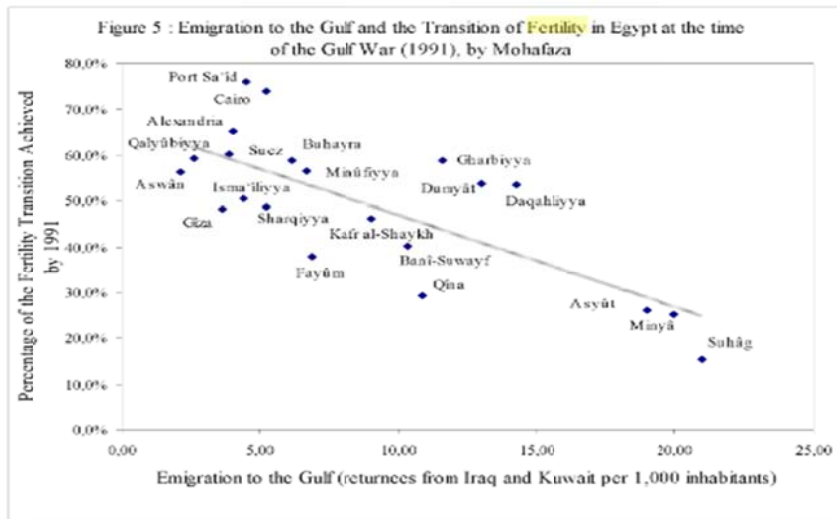
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This graph is terrific as part of the discussion, but unfortunately it suffers from poor legibility. The same applies to Figure 4.3.2 below.

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Finally, for Figure 4.3.1, please add the source.



Source: Fargues 2007, p.175

Comment [a2]: This table is taken from the article of Philippe Fargues published in the volume edited by Ozden C., Schiff M., 2007 (eds) International migration, economic development & policy, page 175, Fig.5.5

I attach the World Bank Policy research Working paper n.4050 of 2006 where in Table 8 you find all the data on which the graph is derived.

In his 2007 paper, Fargues approached the link between migration and fertility more directly and questioned the general view that migrants are potential agents of the diffusion of demographic modernity. He showed that this was only the result of recent migration from high to low birth-rate countries. By comparing fertility in Morocco, Turkey, and Egypt, he first correlated the evolution of fertility with the income dynamic and with women's education, and then he focused on migration's effect pointing out the differential in fertility rates in migrants' destination countries. This varied from two in Europe to seven in the Gulf countries (in 1980–95). He also noted how Moroccan and Turkish migrants went predominantly to Europe, while Egyptians went mainly to the Gulf.

By taking the remittance flows as a proxy for emigration and the strength of the link with home, he pointed to a different link between Moroccan, Turkish, and Egyptian fertility rates and migration, negative in the first case and positive in the second. Fargues did not assert a causal link between the two variables, but the mechanism seems very convincing and reinforces the idea that migrants adopt and send back the cultural values prevailing in their host country.

The model of fewer children but with a better quality of life, health, and more education is not particularly rooted in sending countries, thus sending countries are sensitive to the model their migrants encounter abroad. Migration to Europe has accelerated the reduction of birth rates in the Maghreb countries. The Egypt of the Infitah, on the other hand, with stronger Arab exchanges, has seen a more gradual decline. The story based on a rich knowledge of these countries is very convincing even if the test is only indirect.

Later Beine et al. (2008) built on this hypothesis using aggregate data for 208 countries on migration stocks and aggregate fertility rates. By instrumenting the emigration rate with a set of valid instruments, they find support for the previous analyses that migration towards OECD countries contributes to demographic

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- both Morocco and Turkey (or just to Morocco)? YES

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- Egypt? YES

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⁶ The instrument used a dummy variable for islands, the (log of the) size of the country measured by its surface (in squared kilometres) and (the log of the) distance to the main destination of the migrants.

transition, while the opposite takes place with migration towards countries with high income and fertility rates such as those found in the Gulf.

Bertoli and Marchetta (2015) point to another important difference between migration outflows: while the outflows to the Gulf countries are temporary by nature, because the countries of destination do not offer settlement opportunities or family reunification, migration to OECD countries is both temporary and permanent. For that reason, Bertoli and Marchetta analyze, with micro data, the effect of migrants returning to Egypt from the Gulf countries on the fertility rate. They find that families with return migrants from the Gulf have a higher fertility rate. To find a causal effect they checked for the non-random selection of migrants at migration, but they were unfortunately unable to isolate the mechanism for the transfer of norms.

In closing, there is a strong conviction and, indeed, evidence that fertility is affected by fertility norms imported from abroad by migrants. However, given the many channels of information that can affect the family decision, it is difficult to disentangle and to measure the specific effect of migration transfers although it seems very relevant.

4.3.2 Women's empowerment

The effect of the departure of the male breadwinner, since our earlier records of emigration, has conditioned the future development of the family. Women in many cases become responsible for money use in the household and become independent of their brothers and father. They are thus able to take decisions regarding their children, and their authority in society is growing. This does not imply the implementation of a new imported model, but just a change and a more egalitarian evolution in gender roles.

Women's emigration has increased their independence even more and in many cases women have become the family breadwinner.⁷ Migration has also changed women's roles in the origin society. Its dynamic has been slow and in some cases they have been trapped in the patriarchal family without any independence. Indeed, for some women migrants going back has just been a return to the past, with limitations that are no longer acceptable or rational. For this reason, some of them have been reluctant to go back.⁸

Migration and especially temporary migration transfers home new values and new ways of organizing the family and social life. Both Okolski (2012) for Poland and Sandu (2010) for Romania consider temporary migration one of most potent modernizing factors today, because they act directly at the individual level.

Grabowska and Engbersen (2016) analyze the effect of the values brought back by temporary Polish migrants by surveying empirical research into two phases of Polish emigration: one at the end of the 19th and the other in the early 20th century, as well as the most recent migration waves before and after EU enlargement. They structure the results in the Lewitt categories: normative structure, systems of practice, and social capital. They then argue that old migration brought back non-conformist attitudes, and a greater attention to individualistic autonomy that favored the emancipation of social roles, especially for women.

⁷ Of course, we do not consider trafficked women.

⁸ Iredale, Guo and Rozario (2003) note that when skilled women return home, they often face a range of problems. There is a disjuncture between their own aspirations as highly skilled and educated returnees and local gendered perceptions and modes of discrimination that inhibit their full economic, social, and political participation in their own communities and societies.

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Also the systems of practice gave less importance to religious practices and more importance to individual efforts and work achievement. This has introduced an alteration of family bonds with transnational families, the acceptance of a single status, and divorce. In more recent migration waves the revision of gender roles and family relations has continued. Women have gained more self-esteem and self-confidence. White's (2011) survey of Podkarpacie showed that when migrants returned from the U.K., those under 25 were less supportive of traditional gender roles; Western ideas, it was argued, reinforced a willingness to change gender roles, something already diffused among the better educated and the younger members of society.

The empowerment of women begins to occur when migration draws women from rural to urban areas (Hugo 2000), separating them from a family group. These migrants are engaged in employment outside the home in formal sector occupations, within the legal framework for an extended period. Empowerment is still more dramatic with their move abroad and reduces the intergenerational impact of the patriarchal structure within the family by resisting their identity as subordinate subjects.

A good deal of evidence from different cultural backgrounds exists: in the cases of Peruvian and Bolivian migration (Bastia and Busse 2011), Senegalese migration to France (Jettinger 2011), and even internal Chinese migration (Connelly et al. 2010), the distinction between the place of reproduction (family back home) and the place of production (foreign labor market) has changed women's childcare as provided in a patriarchal society. Women migrants also give priority to investment in health and education as revealed by Mexican (Pfeiffer and Taylor 2008) and Ghanaian experiences (Guzman et al. 2008), or at least more than men in these cases.

There is growing evidence of collective action and mobilization among migrant women in various parts of the world. This suggests that their empowerment has come from a combination of external impetus and internal transformation, and that they would like to transfer their empowerment home and into the political arena.

Two econometric studies – a broader one by Lodigiani and Salomone (2012) that covers 78 countries and a more country-specific study on Turkey by Akkoyunlu (2013) – try to find a causal link between international migration and women's seats in parliament. This is one of the two measures⁹ of women's empowerment used in the [Gender Inequality Index by United Nation the Human Development Reports](#).

Lodigiani and Salomone use annual political data from Paxton et al. (2006), which provides very detailed yearly data on women's inclusion in parliamentary bodies. They take 78 countries for the period 1960–2000. Many technical solutions have been adopted to make the two datasets compatible with a traditional Heckman selection. The results confirm that there is a strong positive role for the migration index, namely the share of migrants weighted by the differential in women's seats in the destination countries versus origin countries. The results work with many alternate specifications and controls.

Akkoyunlu (2013) uses the number of women in parliament in Turkey, chosen as a gauge of women's empowerment, and looks at its evolution in terms of the emigration rate, the relative education of women to men, and democratic measures. Six decades of data, from 1960 until 2011, shows a strong positive effect for migration, which is stronger for migration to European countries and to core OECD countries. Unfortunately, the question of endogeneity is not raised by the author.

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To illuminate for readers whose index this is, a suggestion is to add that these reports are produced by the United Nations Development Programme (either in the main text or footnote).
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⁹ The second measure is achievement in secondary and tertiary education.

All this research suggests that the effects of cultural, social, and political remittances brought back from migration by both men and women are very broad, but they are very difficult to measure given the direct and indirect effects of economic remittances.

4.3.3 Political remittances

The impact of migrants on the home country's political life has been studied by sociologists, anthropologists, and economists. Sociologists elucidate the complex relationship between the social infrastructure of transnational connections, remittances, and their political implications, while economists concentrate on the causality of the relationship.

All reach the same conclusion, namely that migration, by confronting individuals with new environments and novel institutional organizations, force a comparison with origin countries and affect political norms there. Migrants are very important transnational political actors. As some political scientists have pointed out, migrants are "new and unaccounted power groups" (Itzigsohn and Villacre 2008), a vector of mass-level democratization diffusion (Perez-Armendariz and Crow 2010). The relationship embedded in the democratization–migration nexus (Ruland et al. 2009), however, is more complex in terms of showing and disentangling it than that in the already complex development–migration nexus (Kapur 2010).

Pfütze (2012; 2014) claims that economic transfers have an effect on political outcomes. He argues that economic remittances contribute to increases in household incomes that "make *clientelism* unambiguously more costly and, therefore, reduce turnout for the party engaging in clientelistic arrangements". In this way migration promotes the "quality of democracy" in the sending country. He uses Mexico as an example.

Migrants affect political behavior in the country of origin in many ways, by sending money and cultural goods, and with their different interpretation of everyday behavior. The challenge for researchers is to distinguish the specific impacts, in this case the remittances of democratic values and norms, which should stand apart, following Pfütze, from the monetary ones.

Depending on the institutional quality of the country of destination, the effect can be positive or negative: in all cases the perceptions of migrants will be different from the perceptions of non-migrants. Examples from very diverse areas come to the conclusion that migrants and return migrants are more critical and demanding in terms of rights, in Mali (Chauvet et al. 2016), Mexico (Perez-Armendariz and Crow 2010), the Philippines (Rother 2009) and Cape Verde (Batista and Vincente 2011).

In the past research focused only on the effect on developing countries' democratic systems. However, the end of the Cold War and the fall of the Berlin Wall has created an interesting area of research in countries closer to Western Europe, for instance Poland. Grabowska and Engbersen (2016) showed for Poland that, in the first migration waves at the beginning of the 19th century, migration helped in creating a secular social space. Here citizens assembled in non-religious spaces for the first time. Remittances from migrants brought back the desire for a democratic society. Ahmadov and Sasse (2016) studied, for Poland, the effect of integration on political participation in the country of destination and involvement with the diaspora. By using a large dataset on the voting behavior of Poles living in U.K., but geographically dispersed in the country, along with interviews of Polish migrants in the U.K. and their families at home, they established that shorter stays were linked to higher electoral engagement, while longer stays were associated with lower *more non-electoral* engagement. Therefore, integration in the country of destination results in less political involvement in the origin country. The local economic development and the size of the Polish community have a negative effect on political engagement for the first of these characteristics and a

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positive one for the second. Interviews reinforce the results and show the need for a more flexible understanding of political participation, which include the desire on the part of parents to root children in their Polish heritage. This probably has wider implications for research on the cultural dimension.

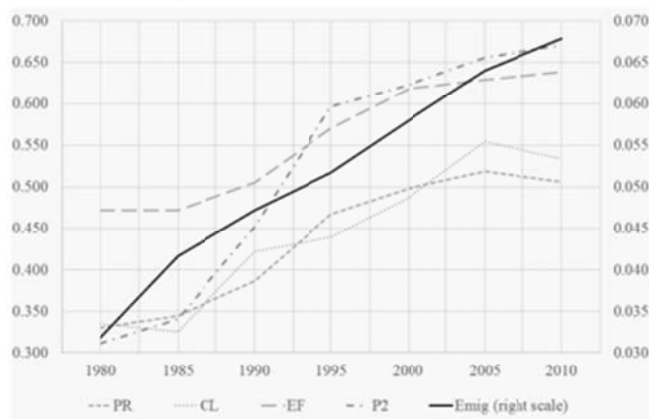
Economic researchers have also sought a causal link between democracy and migration remittances. The first paper at the macro level by Spilimbergo (2009) provided evidence that foreign-trained students promoted democracy at home if their foreign education was acquired in a democratic country. He does not identify the mechanism that spurs this effect, but many channels work in the acquisition of norms and values while abroad: access to foreign media, willingness to preserve foreign networks, etc. Finding the channel is even more difficult than identifying the effect, of course, because the data used do not distinguish between students returning home and those still abroad. Even if the evidence is considered convincing, the research has a limited control over endogeneity. There is the possibility that migrants who are more sensitive to democratic values move to more democratic countries and for that reason, transfer democratic values because they already support a more democratic regime. In a similar vein Mercier (2016) points to a positive correlation between political leaders¹⁰ who studied abroad in high-income OECD countries and the change in the score of democracy in their country during their tenure. Thus not only migration policy but also education policy can shape the democratic transition of countries and the two are intertwined.

The research at the aggregate level that tries, with most conviction, to find a causal relation between migration and democratic institutions is that by Docquier et al. (2016). They use four measures: political rights as well as civil liberty (Freedom House); economic freedom of the world (Simon Fraser Institute); and Polity 2 indicators (Polity IV Project). Their graph (Figure 4.3.2) shows an upward trend in the four institutional indicators and in emigration rates, and is very suggestive.

Figure 4.3.2 Democracy and emigration rates over time (1980–2010)

¹⁰ The study is based upon a dataset of 932 politicians who were at the head of the executive power in a developing country over the 1960–2004 period.

Figure 1. Democracy and emigration rates over time (1980-2010)



Notes. Four democracy indices are normalized between 0 and 1 and measured on the left scale: PR = Freedom House's index of Political Rights; Democracy indices; CL = Freedom House's index of Civil Liberties; EF = Simon Fraser Institute's index of Economic Freedom of the World; and P2 = Polity IV Project's index of democracy (Polity 2). Emigration rate: Emig = stock of emigrants divided by the native population (Brucker et al., 2013). For each indicator, we compute the mean levels of all developing countries in a balanced sample (World Bank classification).

Source: Docquier et al. 2016.

They have an unbalanced panel from 1980 to 2010, with seven observations for each country and a larger cross-section that includes OECD and non-OECD countries. The results, of both the cross-section (only for 2000) and those in the time series dimension, show a strong link between emigration rates and three democratic indicators that proxy *de facto* democracy. The last index, Polity IV, which proxies *de jure* democracy, is rarely significant. These results, instead of weakening the interpretation of political remittances brought back by migrants, strengthen it because the *de facto* norms are the relevant ones for social well-being: the *de jure* norms, while important, are frequently outside the control of citizens, and therefore they are less relevant for the progress of social and civic life in the origin society. Also, the non-significant result for highly skilled migrants supports a transfer of everyday life norms that can be appreciated by citizens at all levels, and not just a transfer among the elites.

The last and very convincing contribution to this broad scenario is the Moldovan case study by Barsai et al. (2016). They use the results of Moldovan elections at the regional level and find that the regions where emigration to Europe prevailed over emigration to Russia had lower votes for the former Communist Party.

4.3.4 Conclusion

This brief survey shows that migrants play a very important role in shaping the values of society in their countries of origin. These values affect many aspects of the lives of individuals, families, and society as a whole. It is very difficult to distinguish the role of the migrants from the role of the diaspora, which is likewise made up of migrants. It is also difficult to disentangle the role played by migrants from that played by government policies, for instance through cultural diplomacy activities, which are directed at the same

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objective. Still, it is clear that staying as a student or as a worker in more democratic countries, where women have more rights and thus a more independent role, has an effect upon the lifestyle of the foreigner and offers a different model of participation in society. For example, migrants see societies where women have more rights and hence more independence, which allows them to pursue education and employment and to have fewer children. These facts are too often disregarded in the debate on migration, whereas they should become an important feature in the integration strategy of asylum seekers in the host countries, given all the beneficial effects that can be transferred to their home countries.

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Comment [KK13]:

Highlighted for possible updating in line with footnote 4.
Another document has been added

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