

CONFERENCE NEWS

Social Policy and Migration

*Report of the UNRISD/IOM/IFS International Workshop
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Contents

Introduction	1
The Migration— Social Policy Nexus	2
Migration and Poverty	3
Remittances and Social Development	5
Human Resource Flows: Brain Drain or Brain Gain?	7
The Implications of Migration for Gender and Care Regimes	8
Migration and Social Development: Organizational and Political Dimensions	10
Regional Dynamics	12
Concluding Remarks	16
Agenda and Papers Presented	18
Participants	19

Introduction

Migration is both a central, and a cross-cutting, theme in research on social policy in a development context.¹ So it is surprising that, so far, researchers have made little effort to analyse this relationship systematically and comprehensively. In an effort to begin addressing this gap, the United Nations Research Institute for Social Development (UNRISD), International Organization for Migration (IOM) and Institute for Futures Studies (IFS) drew on their respective areas of expertise to organize a workshop on the intersection between social policy and migration from the perspective of migratory flows among developing countries. At the workshop, held in Stockholm on 22–23 November 2007, researchers presented six commissioned issues papers and three regional papers, and exchanged ideas and innovative approaches with other workshop participants, including practitioners, government officials and representatives from international organizations and donor agencies.

¹ See, for example, the UNRISD research agenda for 2000–2009, published as *UNRISD 2000+: A Vision for the Future of the Institute*, UNRISD, Geneva, April 2000; and *Social Development Research at UNRISD 2005–2009*, UNRISD, Geneva, July 2006.

Frank Laczko (IOM) and Joakim Palme (IFS) opened the workshop, welcoming participants and emphasizing the need to engage in informed debates on the impact of migration on social development in general, and on implications for social policy in particular. One of the key objectives of the research commissioned for the workshop, Laczko said, was to begin filling conceptual and data gaps related to South-South migration. In their opening statement, research coordinators Katja Hujo and Nicola Piper added that one of UNRISD's broader objectives is to stimulate dialogue and contribute to policy debates within and outside the United Nations system, and this collaboration is one example of how this can be done. They explained that UNRISD research has demonstrated how social policy can serve as a powerful instrument to foster economic development, social inclusion, cohesion and rights. This workshop was guided by questions related to the impact of migration on social development in Southern contexts. Specifically, it examined the implications for all spheres of social policy, including gender roles and care regimes, social protection and redistribution as well as the relationship between citizens and the state in both destination and origin countries. Migration impacts on all the spheres with



which social policy is concerned, and because it has both a national and an international, or transnational, dimension it also affects policy at all levels.

The Issue and its Relevance

Current academic and political debates in countries across the world identify international migration as a key aspect of contemporary social and economic life. Increasing attention is being devoted to a variety of social and development problems linked to migration, as well as to the opportunities for the countries, communities and migrants involved. Much existing research, however, has focused on a specific flow of migration, namely from South to North, whereas the consequences of South-South and internal migration are under-researched. Studies on the development impacts of out-migration on developing countries have tended to focus on financial and human resource flows, particularly remittances and skilled labour migration (“brain drain”).

Assessing the relationship between migration and social policy raises several crucial questions.

- What is the nature of the migration–social policy nexus in developing contexts?
- In these contexts, what impact does migration have on poverty, and vice versa?
- How does migration affect social policy and service provisioning in developing countries, and vice versa?
- What variation, if any, exists between South-North and South-South migration contexts in terms of social policy and development?
- How applicable are the analytical frameworks for phenomena like remittances, brain drain, the global care chain, or transnationalism for contexts of South-South migration, and what is their relevance to social policy?
- What organizational and political linkages have a bearing on social policy and service provisioning?
- Are there visible trends in Southern regional contexts in terms of an evolving cooperation on migration policy?

These questions formed the backbone of the research that was discussed at the workshop.

The Migration–Social Policy Nexus

Migration affects social policy and service provisioning in multiple ways in developing countries. While research has emphasized aspects like remittances and brain drain, it is also important to examine other linkages, such as the impacts of migration on patterns of welfare provisioning and social protection systems; issues of access to social benefits and services, redistribution and social inclusion; and broader questions of citizenship and the relationship between the resident population and the state. The first session explored how migration affects social policy and service provisioning in developing countries and what sort of variation, if any, exists between South-North and South-South migration contexts in terms of social policy.

Jane Pillinger’s presentation explored the social policy implications of migration, and how research and policy developments in this area are shaping the thinking and direction of social policy in both industrialized and developing countries. Pillinger showed that to date, the main focus of research and policy debate has been the social policy implications of migration for industrialized countries of destination, with a particular emphasis on the integration of migrants into these societies, and their adaptation to and impact on the countries’ welfare systems. This has been to the neglect of social policy analysis of the implications of migration for the welfare systems of developing countries. Furthermore, limited attention has been paid to the implications for developing countries’ often rudimentary but evolving welfare systems of the increasing reliance on migrant workers to provide services in the West (particularly in welfare services where labour shortages exist: health care, child care, elder care and so on).

Pillinger argued that in order to understand and improve the linkages between migration policy and social policy, there is a need for a new research agenda that addresses the impact of international migration on the development of welfare systems, particularly in developing countries. A central question is the extent to which migration impacts on government social policy and programmes, and how government programmes impact on migration decisions. Such a research agenda would need to link migration to welfare in the broadest sense, including poverty,

inequality, service provisioning and related issues of human capital.

According to Pillinger, existing research and policy debate in the areas of social policy and migration policy tend to be located in separate domains, with studies that integrate them the exception rather than the rule. The need for a new research agenda also reflects the fact that little is known about how welfare systems in developed and developing countries adapt to and are affected by international migration and globalization. Moreover, a transnational approach to social policy and an interest in the social impacts of migration policy has developed. As a result, today there is a greater interest among researchers and practitioners in both fields to develop analytical frameworks that improve the coordination and understanding of global social policy connections on the one hand, and socially focused migration policy on the other.

Pillinger also cited the growing interest in transnational and global social policy, as well as how Northern welfare regimes have dealt with international migration. This raises a number of questions about the need for greater bilateral and multilateral policy coordination in the area of migration and social policy. Consequently, social integration as a determinant of international migration is an area that merits new research. In the same vein, new research should explore the extent to which migrants can become agents of development, and how this agency is enabled or constrained by the immigration and integration policies of countries of transit and destination.

As discussant for Pillinger's paper, Kristof Tamas focused on two aspects: first, the fact that employment and labour markets link migration and social policy issues; and second, the recent European Union (EU) development cooperation policy in the area of migration. With regard to the latter, he reported that the social dimension of globalization was increasingly recognized as part of external policies in an EU framework, and that the issue of regional cooperation, also with regard to social policy, was to be included. With respect to the former, Tamas referred to the challenge of integrating informal sector workers into the formal protected labour market, as this was of particular importance for the well-being of these

workers in general and for informal migrant workers in particular. He added that labour market developments in the EU, such as ageing or shortages in specific sectors, have a crucial impact on migration patterns, especially from the South. He said that close cooperation and partnership with developing countries was essential to manage these processes in the interest of all.

During the plenary discussion, participants raised the problem of imposing Western-derived notions on developing countries. The fact that most developed countries encourage high-skilled migration from the South was also identified as a problem, not only for sending countries, but also in relation to the status of often undocumented, low-skilled migrants (many of them women) in Northern destination countries. In response to this, Tamas stated that the EU aimed to develop clear recruitment guidelines for migrant labour and that, at the same time, the intention was to collaborate closely on national development strategies with Southern partners.

Migration and Poverty

There is a growing interest in the relationship between migration and poverty. On the one hand, migrants are typically not from the poorest population strata, as a certain amount of resources—human, social and financial—are necessary in order to move across borders. If this is the case, positive returns from migration (such as remittances) are likely to benefit the relatively better-off and might reinforce patterns of inequality. On the other hand, the causal relationships are highly context specific (for example, voluntary versus forced migration) and change over time. The effects of migration on poverty are likewise ambiguous: poverty can be alleviated as well as exacerbated by population movements. The second panel was concerned with the links between migration and poverty in general and the effects of migration on poverty in particular; the implications for aid policy and donor-driven processes like Poverty Reduction Strategy Papers (PRSPs); and the challenges for policy makers at national and regional levels.

Poverty research offers several established understandings of the nature, dimensions and complexity of

poverty, according to Shahin Yaqub, and that research is a good place to start framing the linkages between migration and poverty.² Yaqub argued that context-dependency must be central to attempts to understand migration-poverty linkages. Much of how migration manifests itself in poor families might be misperceived or underestimated unless it is rooted in the socio-economic structures of disadvantage that the poor face, and the resulting compromises and choices they make to secure life and livelihood.

While he and De Haan had reviewed both international (cross-border) and internal migration, their paper focused on the latter as being more tied to global poverty. Yaqub explained that while the literature on internal migration and poverty is still evolving and quite controversial, it nevertheless has a long tradition, and has shown the main channels by which migration might reduce consumption poverty. This literature also offers analytical tools that can be applied to less-studied areas and are integral to understanding poverty.

Yaqub then discussed existing research gaps by drawing attention to the fact that poverty research has long recognized that poverty is multidimensional, dynamic over time and different among household members. Intrahousehold risks, dynamics and effects across generations have received some theoretical attention in migration research, but empirical inquiry in this area is limited. A particular generational issue relates to children's migration, which is often wrongly perceived. For example, one such idea is that children's well-being in the context of migration can be lumped together with that of adults, without recognizing the distinctiveness of childhood, in terms of its socio-legal norms and constructions, and the biological processes of growing up. Children have specific vulnerabilities and needs, and enjoy specific provisions under the Convention on the Rights of the Child that are portable and borderless. Moreover, as the next generation, the well-being, care and nurture of children as they grow up is an important factor in the persistence of poverty over generations.

² Yaqub's presentation was based on the paper *Migration and Poverty: Linkages, Knowledge Gaps and Policy Implications*, which he co-authored with Arjan De Haan for his workshop.

With regard to migration scholarship, Yaqub went on to explain the distinction in their paper between "migration optimists" and "migration pessimists". The former argue that where migration does not lead to reduction in disparities, this tends to be due to barriers for migrants, such as international borders or labour market inefficiencies. The latter, by contrast, emphasize that there is very little empirical evidence to show that migration does in fact lead to reduction in disparities. According to Yaqub, the conclusions of optimists and pessimists are not necessarily incompatible. Migration has different impacts in different contexts. It should be seen within a larger strategy of poverty reduction and not as an optimistic "solution" or as a pessimistic "problem". The key is finding the right balance between the two approaches. The challenges for policy makers at the national and regional levels include practical ways of integrating migrants into development processes, but also more entrenched issues related to the way social policy interacts with citizenship.

By way of conclusion, Yaqub returned to the complexity of analysing migration and poverty. Much is known about the motives of migrants and their contexts, especially if they are viewed as a largely homogenous mass within the black box of the household. But less is known once the focus shifts to intrahousehold processes in gender and childhood. Empirical findings about linkages between migration and poverty differ greatly, and there is a sense—although difficult to prove at this stage—that there may be a causal link between simplified theoretical assumptions and conflicting empirical results.

Frank Laczko, the discussant for this presentation, emphasized the general problem of a lack of data with regard to both internal and international migration and their impacts on poverty, whether measured in terms of income or more qualitative social indicators like education. He mentioned that migration can have ambiguous effects on poverty, as it can alleviate or exacerbate it. The lack of systematic research on these questions is especially apparent in the discussion of PRSPs and national development strategies, he said. Migration is still not mainstreamed into the big development agendas. According to Laczko, it is also important to take note of the fact that governments could restrict access to

welfare systems in order to discourage migration. On the other hand, there are governments that promote migration and are concerned with the welfare of their citizens living abroad.

Several important issues were raised in the plenary discussion, such as the need to differentiate between household and family, as social policies targeted at families often do not reach family members lacking legal status—either regarding marriage or the recognition of children—or the difference between children’s agency and adults’ responsibility for children’s well-being. One participant pointed out the apparent contradictions between development and migration policies, as reflected in the need for cheap labour in deregulated and liberalized labour markets on the one hand, and the call for qualified labour migrants on the other. In addition, there is a general failure to identify clearly the links between specific economic reforms, such as trade liberalization in sub-Saharan Africa, and increased out-migration from affected countries due to deteriorating economic opportunities.

Remittances and Social Development

Scholars often assess the impact of migration on developing countries by way of migrants’ remittances (that is, the portion of their income sent home). Remittances have often been approached from the viewpoint of regular migrants—those who have secure residential status, and who remit through institutional arrangements that exist mainly in Northern countries. But it is also important to examine remittances associated with the temporary migrants, and unskilled or semi-skilled workers, who constitute the majority in many parts of the world and who generate a greater total volume of remittances than migrants in the highly skilled and professional categories. This session sought to identify the implications of remittances for how developing countries finance social provisioning, and to explore how remittance volumes, channels, investments and institutions differ in a South-South context.

Hein de Haas started his presentation by pointing out that the past few years have witnessed a remarkable renaissance in the interest in remittances, triggered no

doubt by a striking increase in remittance flows. As a result, after years of relative neglect, they have been rediscovered as a potential source of development finance. Registered remittances now amount to well over twice the amount of official development assistance and are 10 times higher than net private capital transfers to developing countries.

However, de Haas argued, the current debate on migration, remittances and development suffers from a number of shortcomings. First, the current “remittance euphoria” often coincides with a certain perception that it concerns a “new” issue. Yet, any suggestion that the topic is new suffers from historical amnesia of decades of prior research and policies, and it is important that the findings from previous empirical research and policies on migration, remittances and development be taken into consideration.

Second, according to de Haas, there has been a one-sided focus on remittances and their direct economic consequences. Less systematic attention has been paid to the non-pecuniary impacts of remittances—on health, education, gender, care arrangements, social structures and ethnic hierarchies in migrant communities and countries. The non-remittance-related effects of migration, such as the role of migration and migrants in cultural and social change in origin societies, have also been neglected.

Related to the two previous points, de Haas observed that the recent empirical and policy literature on remittances has been poorly embedded in more general theoretical frameworks on migration and development. Many empirical studies have not been designed to test hypotheses and, even more importantly, make little if any reference to broader theoretical debates on migration and development. This renders the often-conflicting findings from empirical studies difficult to interpret theoretically, when in fact they would be extremely useful in building more sophisticated frameworks that could account for the heterogeneity of interactions among migration, remittances and development.

For de Haas, another fundamental issue is the almost total absence of a foundational debate in migration studies on what the concept of development actually

means. While this concept is almost never explicitly defined, most approaches to migration and development tend to be based on notions of development that focus on (gross) income indicators. Consequently, the focus has been the impact of remittances on income growth and on investment in productive enterprises. This conventional focus is arbitrary, since remittances and, more generally, migration, impact on a wide range of societal issues beyond income. De Haas elaborated this point, stating that these issues may include income risks (rather than levels alone), income inequality, investments in human capital (for example, education), gender inequality, birth and death rates, ethnic relations, political change, the environment and so on. Migration impacts may also differ significantly across these various dimensions of social and economic change. Therefore, according to de Haas, evaluating “the” impact of migration and remittances is far from straightforward, as it depends on which dimensions of socioeconomic change are considered as developmental and the relative weight attached to them. What is seen as developmental, moreover, depends on the disciplinary, cultural and ideological perspectives of researchers and policy makers, who tend to project their own norms, preferences and expectations onto the communities and societies that they study or on behalf of whom they are making policy.

De Haas advocated a broad view of human or social development in the context of remittances in order to highlight the necessity of looking beyond income indicators, and also to study the multifaceted ways in which migration and remittances affect the well-being and capabilities of people in migrant-sending societies. This point also brings out the importance of looking not only at how remittances affect migrants and their families, but also how they affect sending communities and societies *as a whole*. For de Haas, the following questions remain largely unaddressed.

- How do remittances affect equity and inequality in social and economic opportunities within communities?
- Do remittances increase people’s capabilities to protect themselves from income shocks?
- How do remittances affect people not receiving them? Do some remittances accrue to them indirectly through investments and income multipliers, or do

they instead deepen the poverty of these individuals and exacerbate inequalities?

- How do remittances affect ethnic and gender inequalities? What are the consequences for social reproduction and care regimes?
- How do migration and remittances affect institutional change as well as the capabilities of people to participate in public debate in countries of origin?

De Haas raised one important caveat: the remittance focus of his presentation did not by any means imply that migration does not affect development in ways other than through remittances. For instance, migration often has important effects on (transnational) identity, cultural change, social structures and political debate. In fact, his analysis exemplified the fact that remittance impacts are seldom isolated from other migration impacts.

Andrés Solimano was the discussant for this presentation. He acknowledged the balanced approach and the volume of literature surveyed in the de Haas paper. He then questioned the extent to which remittances could truly be considered an external transfer to countries of origin, as the export of people and related costs had to be taken into account. As remittances are money earned by nationals, they could be seen as compensation for lost resources. Solimano said the sustainability of the upward trend of remittances in recent years was unclear, because the amounts being sent home tended to decline over time. However, as research on average amounts sent home by Latin American migrants in the United States shows, remittances in the beginning could be as high as a monthly minimum wage for receiving families. Solimano also raised the issue of the use of remittances for investment or consumption expenses. Only 20 per cent of remittances are used for (mainly small-scale) investment; the rest is used for consumption expenditures, sometimes as collateral for loans. Lastly, he cited the problem of the high administrative costs of sending money home, as well as the need to give migrants access to banks regardless of residence status.

In his response, de Haas recognized both the relevance of the compensation element of remittances, and the difficulty of quantifying it. With regard to a potential

decline of flows over time, he pointed to the fact that world migration would probably not slow down in the near future, and that it could not be taken for granted that remittances decline over time. De Haas did not think the fact that 80 per cent of remittances were used for consumption purposes constituted a problem, since consumption expenditures have important beneficial effects for household well-being and for local economies.

Human Resource Flows: Brain Drain or Brain Gain?

The consequences of migration for labour markets in developing countries have so far been studied primarily under the conceptual framework of “brain drain”, involving a numerically small number of “elite” migrants moving South to North. But the bulk of migratory flows within Asia, for instance, take place under temporary contract schemes involving mostly semi- and unskilled workers, or migrants in an irregular situation. As a result, return or circular migration is far more prominent. The transient and fluid nature of such forms of migration has different implications for social policy and social services in sending countries than other migration streams (that is, highly skilled and/or permanent). Furthermore, the concept of brain drain has not been examined from an intraregional or South-South perspective. The guiding questions for this session, therefore, revolved around how migration between developing countries affects key social service sectors like health and education, and whether the concept of brain drain is applicable in these contexts.

In his presentation, Jean-Baptiste Meyer used the mobility of health professionals and resulting shortages of medical staff in a number of developing countries as one example that has received recent attention. In the health sector, flows between countries have mainly been from the South to the North, more specifically to a small number of receiving countries in North America and Western Europe. However, new analyses show a trend toward diversification of destinations and of providers of health personnel, with some recent data indicating an increase in South-South flows. Using the same data and comparing the magnitude of outflows with local shortages, however, shows that the outward

mobility of medical staff is but a small part of the countries’ deficit. Nonetheless, Meyer noted that the impact of such outflows on training, education, and the sustainability and reproduction of local capacities in health should be discussed beyond mere quantitative evaluation.

Meyer contended that conventional wisdom on brain drain—that it entails long-term or even permanent loss of human resources—is partly outdated. This is due to significant changes in mobility and communication patterns, including cheaper transportation that facilitates short-term migration and cross-border commuting; increasing return, transmigration and information flows through media satellites; and diaspora contributions to home country initiatives. Thus, Meyer argued, a circulation paradigm has emerged, and the notion of “brain gain” came to the forefront in the 1990s with basically two options: return or diaspora. Return migration has been particularly successful in the case of the Asian newly industrialized countries since the late 1980s, but conditions for replication elsewhere (a prerequisite is strong economic growth) have often been lacking. During the mid-1990s, the diaspora option—that is, the connection of highly skilled expatriates with their country of origin in order to contribute to its development—emerged as a way to mitigate brain drain and the shortage of adequate human resources in the South. As a theoretical paradigmatic shift and alternative policy option, it has come under scrutiny and faced a number of critiques that question the magnitude of the phenomenon, the sustainability of diasporic initiatives and their real impact on the development of the origin countries.

Meyer further explained how the exploration of a public and social policy framework to deal with migration and development leads to a complex picture. There are no recipes for general management since networks, countries, conditions and development processes are multiple and diverse. A clear understanding of the network dynamics and the mediation instruments, or institutions, that connect heterogeneous entities together is required in each specific case.

Meyer suggested that sociological concepts may aid understanding of these dynamics and mediation processes. The specialized literature on social capital,

socioeconomics of innovation and networking provides keys for the interpretation of what happens in diaspora networks. Traditional entities—such as national and local public (state) institutions as well as firms, non-governmental organizations (NGOs) and inter-governmental organizations—could be involved in the process of building sustainable diaspora networks.

Discussant Binod Khadria picked up on the issue of the diaspora option having emerged as a possible mitigation of brain drain in the South during the 1990s, while also facing a number of critiques. In this context, he asked, why was the diaspora option not receiving the support that the return option was? Were there vested interests of Northern countries involved in this?

According to Khadria, the double challenge inherent in the diaspora option needed to be brought to the fore and, in so doing (i) convince Southern diaspora leaders in Northern countries to prioritize the diaspora option as a bottom-up strategy of development; and (ii) convince host countries and intergovernmental organizations about the merits of the diaspora option vis-à-vis the return option.

In response, Meyer reiterated the importance of the diaspora option, based in particular on evidence from Asian migrant communities in North America. He acknowledged that greater state involvement and facilitation can reinforce the social orientation of diaspora efforts. In general, though, data constraints are severe and make it difficult to determine what kinds of migrants (labour, refugees, family members

it—very carefully, saying that circular migration policies have the potential to hamper development and generally do not allow families to settle permanently. In addition, said this participant, migration cannot be separated from labour market demands and the very concrete structures underlying the organization of production in a society. In this sense, migration cannot be “planned”. This point was exemplified by Japanese labour recruitment, which is characterized by a “just-in-time” approach that corresponds to the just-in-time production imperative.

Following up on these comments, other participants again called for the need to better understand the role of the state in migration and development processes. Discussion of social policy tends to assume a role for the central state, and indeed, Hein de Haas noted that the central state has a fundamental role to play in social development, given that the phenomenon of migration highlights the weakness of states in providing basic social security in the first place. However, as another participant noted, many social impacts of migration occur at the local level, as is the case, for example, with remittances. Migration today often occurs in the context of decentralized or decentralizing social policies, in which local governments are called to play a key role and local populations are expected to participate in decision making. In response, Meyer emphasized that successful efforts by states to coordinate development-oriented investment by diasporas depend on the engagement of many actors beyond the state.

The Implications of Migration for Gender and Care Regimes

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