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## 5 Contemporary migration seen from the perspective of political economy: theoretical and methodological elements

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Contemporary migration studies tend to consider this phenomenon as an independent variable excised from the context of global capitalism. Research approaches are mostly descriptive and schematic and often split by disciplines, all of which limits the understanding of migration and any opportunities we might have to influence it. Political economy provides an analytical alternative with which to engage this subject, addressing it from the historical, structural and strategic viewpoints. This approach constitutes a source of critical thinking through which the complex reality of contemporary capitalism and the role of international migration can be understood and transformed. This chapter proposes political economy as an alternative theoretical and methodological tool with which to uncover the nature and elements of contemporary migration.

### 5.1 THE FOUNDATIONS AND VALIDITY OF POLITICAL ECONOMY

Political economy studies the social relations present in production, distribution, exchange and consumption processes. They are meant to cover material living needs in accordance with the extant degree of productive development and in interaction with existing institutions and power relations. The relationship between the bourgeoisie, who own the means of production, and the proletariat, a workforce deprived of means of production or subsistence, is of peculiar importance, although landowners, the peasantry and other subaltern social classes also play a role. In the words of Engels: ‘economics is not concerned with things but with relations between persons, and in the final analysis between classes; these relations however are always *bound to things* and *appear as things*’ (1859 [1977], no. 16, emphasis in the original).

When Marx undertook a critique of classical political economy as embodied in the work of Adam Smith and David Ricardo, he revealed

the double nature of work (concrete and abstract). This led to the understanding of surplus-value. Capital is seen as a social production relation belonging to the capitalist production mode, where the bourgeoisie appropriates surplus-value while the proletariat receives a salary equivalent to the reproductive cost of the labour force. Generally speaking, political economy studies the development of capitalism – conceived as a historical mode of production – and analyses its main contradictions, trends and transformations. Some of the most important subjects addressed by this discipline include accumulation and crisis; exploitation; the role of the State; class struggle; imperialism; the nature of social networks; and social transformation.

The method of abstraction is particular to political economy and entails separating and analysing simple, condensed elements in order to address a specific relationship in the object of study. For instance, in order to build up a conceptual apparatus to understand social reality, Marx envisaged the realm of production as the most general and, henceforth, as a law-like endeavour. This realm encompasses one of the highest levels of abstraction for disentangling the nature of capitalist societies. Distribution and exchange correspond to more particular realms of reality, accidental and conjunctural in their nature, mediated by class struggles. Consumption expresses the singularity, the most chaotic and unpredictable realm of reality. All these elements are underlying aspects of social reality representing different and interrelated levels of abstraction. This procedure is based on analytical concepts and categories that explain underlying social relations in order to reconstruct the ‘rich totality of many determinations and relations’ (Marx, 1973, p. 101). This is how social relations and processes are organized and fitted into a hierarchy. In addition, political economy simultaneously combines the historical and critical aspects: while the historical trajectory of capitalist society is examined, the validity of the concepts and relations currently taking place in it are also evaluated.

The method of political economy does not imply a unidirectional move from the abstract to the concrete, but rather a two-way, dialectical, enquiry. In this process, a permanent tension between the abstract and the concrete is forged, which entails the necessity to unravel the essence of the analysed phenomena and transcend its surface. This is not evident from a laid-back approach based in simple observation. From a political economy standpoint, it is thus inappropriate to establish an immediate relationship between the researcher and its object of study. In order to comprehend social reality it is necessary to disentangle its historical and social substrata which is not apparent from straightforward observation. At the heart of the political economy method is an interaction of the ‘twin couples abstract/concrete and essence/appearance, and the latter

can be rendered as content/form' (Tarbuck, 1991). Most theoretical and methodological approaches in migration studies depart from the surface of the phenomenon and have contributed to the extraordinary mythology prevailing in the field which distorts the root causes and implications of the migratory dynamic. The political economy approach, on the contrary, allows for an appropriate contextualization and interpretation of the phenomenon avoiding any descriptive and mechanical use of theory where the 'process of abstraction is not abstraction from reality, but rather a process whereby we can truly perceive the reality' (Tarbuck, 1991).

The benefits and validity of political economy can be listed as follows:

1. The social whole. Political economy, especially in its critical, Marxist-derived tendency, seeks to theoretically address the complexity and historical nature of the social whole. That is, it privileges the reconstruction of reality as a concrete totality.
2. Reconstruction is carried out using a trans-disciplinary critical apparatus that delves into the system's major relationships and regularities. This approach contrasts with the fragmented and disjointed analyses, excess of descriptive studies and distribution of knowledge across disciplines that characterize neoclassical economic theory, rational choice in political science and social action in sociology. It also differs from the reductionism espoused by quantitative epistemology, which condenses complex social phenomena into a few variables.<sup>1</sup> Additionally, political economy's encompassing approach, where the whole is more than the sum of its parts but where the parts are also important, refutes the oft-quoted criticism that this discipline is an economics-driven field.<sup>2</sup>
3. The historicity of social phenomena. Social conflict is omnipresent, to the point where history can be conceived as a display of social contradictions. In this sense, history is always a mode of production. Contrary to what conservative, ahistorical and decontextualized approaches suggest, political economy posits that institutionality and bourgeois social practices are historical and transitory phenomena, as are the private ownership of production means, capitalist democracy, salaried relations and the mercantilization of social life. History is seen as a dialectical relationship between social agents, structures and junctures with their own historical/structural limits. This view contrasts with the hegemonic view of the end of history and the final prevalence of a market economy and liberal democracy.
4. Dialectic analysis of society. Political economy is an analytical tool that seeks to transform the contemporary world. A dialectic approach enables us to analyse social contradictions on several levels: generally

speaking, we can look at the contradictions between the development of productive forces and social production relations while, on a more specific level, we look at the concrete developments of class struggle. This crucial aspect of the method employed by political economy requires situating 'the part' within 'the whole', identifying different levels of abstraction. This is known as the dialectics of the abstract and the concrete, where the concrete represents the synthesis of multiple causal determinations at the same time that it stands for the whole of diversity. 'Capital in general' is the highest level of abstraction for the analysis of capitalist reality, and it is this level that Marx addressed in his *Capital*.

5. Bringing theory and practice together. Theoretical reflection and research are not carried out in a purified environment excised from the dynamics of social reality. On the contrary, there is an attempt to unearth the key relationships at the heart of the social organization. Attempts at social transformation must bring together theoretical constructs and strategic social practices. In this particular, there is a point of contact between transforming theory and practice. In contrast, neoliberal hegemony, both political and ideological, upholds methodological individualism while obscuring potential social transformation. At the same time, given its historical and dialectic character and its emphasis on social praxis, political economy refutes determinism, an element often ascribed to it by its detractors. The possibility of social transformation requires a dialectical evaluation of the social agents participating in structural dynamics and practices.

Even so, political economy cannot be taken as an immutable and irrefutable paradigm. Its bases are historical, to the point that they need to be permanently reevaluated in view of current, capitalist realities. Among these new, contemporary elements we can mention the ongoing debate regarding the nature of contemporary capitalism. Associated subjects include the command of financial capital and the speculative whirlwind (Bello, 2006; Harvey, 2007); the new US imperialism (Petras and Veltmeyer, 2001); the role played by the International Monetary Fund (IMF), the World Bank (WB), the World Trade Organization (WTO) and the Inter-American Development Bank (IDB) in the imposition of structural adjustment neoliberal policies (Bello, 2006); new forms of destruction and restructuring under modes of accumulation by dispossession (Harvey, 2003); and the relationship between capitalist restructuring and forced migration (Delgado Wise and Márquez, 2007a; Petras, 2007).

Going beyond the so-called paradigm crisis fostered by the current civilization crisis, which was in turn generated by the fall of real socialism

and neoliberal capitalism, political economy constitutes a theoretical and methodological tool that provides the basic elements required for a historical, structural and strategic analysis of contemporary capitalism. The current systemic crisis and capitalist restructuring process (that is, globalization) can be examined in depth from this perspective, along with other related issues such as the formation of regional economic blocs; the internationalization of production under the aegis of the large, transnational corporations; the reconfiguration of the international division of labour and the emergence of new and more rapacious forms of unequal exchange; the transformation of labour processes under the expansion of a post-Fordist production regime; US political and military hegemony; the growing gap between developed and underdeveloped nations;<sup>3</sup> the transnationalization, differentiation and precariousness of labour markets; the growth of the informal economy; the increase in social inequality across the world; and the generation of a teeming overpopulation that feeds, propels and reconfigures migration processes.

In underdeveloped, peripheral or dependent countries – especially in Latin America – political economy has been used to analyse the conditions of underdevelopment as a concise form of capitalism applied in peripheral or postcolonial nations. This approach splits in two distinct theoretical branches: structuralism according to the Economic Commission for Latin America and the Caribbean (ECLAC) and dependency theory. In regards to the first one, during the 1950s and 1970s, Keynesian-influenced authors like Raúl Prebisch, Anibal Pinto, Osvaldo Sunkel and Celso Furtado examined the decline in terms of trade due to the centre/periphery scheme under which Latin America's insertion into the world economy operated. They proposed industrialization and the spread of technological progress as a solution that agreed with the interests of the national bourgeoisie. In contrast for the dependency theory, between the 1960s and 1970s and in the context of the Cold War, the limitations of Latin American structuralism and the recent success of the Cuban Revolution led researchers like Theotonio Dos Santos, Vania Bambirra, Fernando Henrique Cardoso, André Gunder Frank and Ruy Mauro Marini to posit that Latin America's real problem was its dependent insertion into the international economy. They endorsed a systemic rupture and envisioned socialism as a goal. Some, like Marini, used Marxist theory to characterize a type of dependency centred on the superexploitation of the labour force, while others took a more sociological and political approach. Additionally, there were some Marxist reinterpreters who, like Agustín Cueva, did not fully engage with dependency theories.

These approaches constitute an original system of thought established from the perspective of underdeveloped or dependent nations. However,

they were displaced from academic and intellectual spheres with the imposition (often under the aegis of dictatorial regimes) of neoliberalism, which constituted a true counter-revolution in the theory and practice of development in Latin America and underdeveloped nations in general. Nowadays, given the socioeconomic damage caused by neoliberal processes, we are in need of theoretical, methodological and political alternatives that can lead to new development alternatives. While the alternative approach is characterized by a number of theoretical stances, they all reject the notion of the market as an agent of development. And this is where the political economy of development could play a central role.

## 5.2 THE POLITICAL ECONOMY OF MIGRATION

Marxist political economy addresses the phenomenon of migration at its highest level of abstraction. That is, in relation to the dynamics of capital in general and on the basis of the two following analytical categories: original accumulation and overpopulation.

Original accumulation is linked to the rise of capitalism out of the ruins of feudalism during the sixteenth century. The excision between the producer and the means of production turned direct producers into 'free' individuals lacking means of production and subsistence. Said individuals were then forced to sell their only possession, labour, to those in charge of the means of production (Marx, 1975). This way, the destruction of pre-capitalist forms of production yielded a source of labour for the capitalist entrepreneur and migration appeared as a phenomenon associated with the violent expropriation of peasant land or artisan tools (Meillassoux, 1981). In the context of contemporary capitalism (and particularly within the framework of neoliberal restructuring), this analytical category has been retrieved to characterize the liberalization of the labour force and the concentration of power and wealth among a reduced capitalist elite via what has been termed 'accumulation by dispossession' (Harvey, 2007). This involves the mercantilization of public resources, the progressive dismantling of the welfare state and, in general, a concerted attack on the living and working conditions of the majority of the population. These processes have driven many into unemployment, the informal economy and forced migration (Delgado Wise and Márquez, 2007).

In regards to overpopulation, with the development of capitalism and the creation of a particular technical mode of production (the span from artisanal to industrial manufacture), the growth of capital and, consequently, accumulation ceased to depend on population growth.

Now, capital creates its own population dynamics and, unlike what Malthus posited, it is not population that determines economic growth and wealth: the dynamics of capitalist accumulation generate a supply of labourers that is always higher than actual demand. By creating a redundant population mass, capital permanently ensures access to exploitable human resources beyond the dynamics of demographic reproduction. This generates a relative surplus population, an industrial reserve army that, given its strategic importance for capital, 'becomes, conversely, the lever of capitalistic accumulation, nay, a condition of existence of the capitalist mode of production' (Marx, 1906, VII, XXV, p. 29). In order to address international migration we must first consider the geographical aspect and consider the asymmetrical relations that characterize processes of capital accumulation among regions, nations and areas within nations. The unequal geographical distribution of accumulation results in an also unequal distribution of overpopulation on the global scale. More developed regions and nations with a larger accumulation capacity tend to have less overpopulation, a feature that is compensated by labour immigration hailing from countries and areas with reduced accumulation capacity. Marx coined the term 'absolute surplus-population' in reference to the Irish case and this particular phenomenon (Marx, 1975, p. 880). This explains the existence of areas that serve as labour reserve sources and often suffer processes of depopulation, especially in underdeveloped nations. International labour migration not only manifests the nature of the international capital/labour relationship, it also evidences the subjection of surplus population to conditions of extreme labour exploitation and social exclusion in a context of growing labour market transnationalization, differentiation and precariousness.

As far as the concrete subject of global capitalist development is concerned (that is, that of regions and nations, and taking into account the asymmetries inherent to capitalist development), a number of theoretical, Marxist and heterodox approaches can be classified under the so-called historical-structural paradigm that runs against the functional-modernist one. The most important of these are dependency theories, world-system theory, cumulative causation and dual labour market theory.

Dependency theories tend to view migration as (a) the product of adverse conditions and the limitations of dependent or underdeveloped accumulation and (b) one of the causes behind deepening underdevelopment. Said theories were created during a time when underdeveloped nations were focused on the internal market and they therefore emphasize internal migration (Singer, 1974). World-system theory (Wallerstein, 2005) is derived from dependency theories but focuses on the global capitalist context rather than just Latin America, incorporating the concept



of semi-periphery to the notions of centre and periphery. International migration is seen as the product of the growing (and asymmetrical) expansion and integration of world capitalism, along with the domination of central countries over the periphery and semi-periphery.

The theory of cumulative causation is based on the ideas of heterodox Swedish economist Gunnar Myrdal (1957). It maintains that capitalist development tends to deepen geographical and social inequalities in income and welfare. Migration is seen as a vicious circle that deprives communities of origin of their most valuable labour force, increasing dependency and stimulating subsequent emigration. Finally, dual labour market theory states that international migration is a response to a permanent demand for workforce in advanced industrial societies, leading to a segmentation of labour markets where foreign workers take the low profile jobs rejected by domestic workers (Piore, 1979).

It must be pointed out that the above-mentioned historical-structural approaches are primordially centred on the structural causes of the phenomenon and – most importantly and with the exception of the dual labour market theory – on the asymmetrical relationships produced across the north-south horizon. In contrast to functionalist, modernizing perspectives, they offer a more comprehensive approach to the phenomenon. Admittedly, they do have a limited view of the strategic phenomenon of agency, which is why they are often characterized as deterministic.

### 5.3 THE RELATIONSHIP BETWEEN MIGRATION AND DEVELOPMENT SEEN FROM THE PERSPECTIVE OF POLITICAL ECONOMY

The growing asymmetries and inequalities that characterize contemporary capitalism have led to a substantial increase in population movements, particularly labour migration from the southern hemisphere to the north, notwithstanding an important south-south flow. At the same time, there have been substantial transformations in internal migration circuits and the way these relate to international migration. North-south remittance flow has grown so much it has now surpassed foreign direct investment and foreign official aid in underdeveloped nations. This has encouraged the main international organizations in charge of neoliberal policy to support a *sui generis* development agenda that assumes migration can become a tool for development in countries with high emigration rates.

In view of this, political economy has been employed to provide a renewed, critical analysis of migration and development. While neoliberal stances exaggerate and obfuscate the nature and role of remittances, said



approach expands the analytical field and drastically redefines concerns (Castles and Delgado Wise, 2008, introduction). Among these, the relationships between countries in a context of unequal development; growing imbalances and surplus transfers; labour migration and the precariousness of labour markets involving both qualified and unqualified labour force; and, generally speaking, the dialectics between accumulation and migration seen from a class perspective.

Political economy views international migration as a consequence of problems in development and denies this phenomenon can be studied in isolation. In order to examine migration's causes, effects and interactions with development and analyse the different stages in this dialectic, we must first consider the following analytical elements: strategic practices and structural dynamics.

Strategic practices involve confronting the divergent interests at the heart of the contemporary capitalist structure and its inherent development problems. There are two major projects. (1) The hegemonic project, promoted by large transnational corporations and the governments of developed countries led by the United States, in alliance with certain elites in underdeveloped countries, and under the umbrella of international organizations like the WB, the IMF and the WTO. Nowadays, given the loss of legitimacy suffered by neoliberal globalization, 'domination' is a more appropriate term than 'hegemony', since the project is no longer implemented through consensus but via military and financial imposition in the wake of the Washington Consensus and its post-consensus. (2) The alternative project, comprising a sociopolitical agglutination of social movements and classes, collective agents and subjects, and certain progressive governments and international organizations. All of these are aligned with a political project designed to transform the existing structural dynamics and eliminate political and institutional obstacles impeding the promotion of alternative development processes at the global, regional, national and local levels.

Structural dynamics refers to the unequal and asymmetric way in which contemporary capitalism is articulated across different planes and levels, including finance, commerce, production and the labour market. This also includes areas like technological innovation (a strategic control tool) and the use and allocation of natural resources. These demarcations shape the ways in which relationships between (a) developed nations, (b) developed and underdeveloped nations and (c) underdeveloped nations are established. Said demarcations determine the fields in which relationships between sectors, groups, movements and social classes are developed. All of these are expressed in unique ways at the global, regional, national and local levels.

## 5.4 ELEMENTS FOR THE ANALYSIS OF CONTEMPORARY MIGRATION: THE CONTEXT

In accordance with the tenets of political economy, migration cannot be analysed outside of the specific historical context in which it takes place. Therefore, it is essential that we examine the nature of neoliberal globalization, a process of capitalist restructuring led by large multinationals, the world's most powerful governments and the WB, the IMF and the WTO (Petras and Veltmeyer, 2000; Stiglitz, 2002). The following are some of its major features:

1. The internationalization of production, commerce, services and finance. This entails a profound restructuring of the global economic network via multinational subcontracting links extending throughout countries across the world. It is designed to reinsert peripheral nations into the global system and operates through production enclaves in underdeveloped nations with cheap natural and human resources. It is increasingly sustained by subcontracting mechanisms and implemented by large manufacturing, financial, agricultural, commercial and service sector transnational corporations (Robinson, 2008).
2. Financialization. Financial capital generates speculative strategies that foster the channelling of investment funds, sovereign funds and social-surplus toward new financial instruments that offer short-term high profit margins but can entail recurrent crises and massive fraud; the latter obstruct and affect the functioning of the so-called real economy (Bello, 2006; Foster and Magdof, 2009).
3. Environmental damage. Biodiversity, natural resources and communal and national wealth are now privatized for the benefit of large corporations that favour profits while ignoring social and environmental costs. This leads to increased environmental degradation, pollution, famines and disease. Resultant climate change (global warming and increasingly frequent extreme climatic events) threatens symbiotic relations between humans and the environment (Foladori and Pierri, 2005).
4. The restructuring of innovation systems. Advances in information technology (IT), telecommunications, biotechnology, new materials and nanotechnology cater to the needs of large corporations in search of profits. Scientific and technological research is restructured under mechanisms such as outsourcing and offshore-outsourcing, which allow corporations to have southern scientists at their service, transfer

risks and responsibilities, and capitalize on the benefits by amassing patents. This has led to an unprecedented mercantilization of scientific labour under a short-term approach and with little social concern (Lester and Piore, 2004).

5. Labour precariousness. The main engine behind the new capitalist machine has been the cheapening of labour. Massive labour supply in Africa, Latin America, Asia (mainly China and India) and the former Soviet Union supports this dynamic and has led to the growing transnationalization, differentiation and precariousness of labour markets. The result is a new set of divisions at the heart of the working class: labour, national, racial and cultural hierarchies allow large corporations to benefit from cheap and flexible labour sources (Harvey, 2007; Schierup et al., 2006).
6. The new migration dynamic. While migration is a historical process with a certain degree of continuity, it has undergone a dramatic transformation under neoliberal globalization. It is now characterized by (a) strong pressure to emigrate given the lack of labour opportunities in sending areas and (b) the growing vulnerability and extreme exploitation of migrants in origin, transit and destination countries. New migration waves primarily comprise south-north and south-south flows, as well as a significant volume of internal migration, turning this whole process into an essential element of the neoliberal restructuring strategy (Delgado Wise and Márquez, 2007, 2009; UN, 2004, 2006).

At the end of the first decade of the twenty-first century, a capitalist crisis centred in the United States affected the whole global system on several levels (Márquez, 2009, 2010):

1. Financial. The overflowing of financial capital leads to speculative bubbles that start by affecting large conglomerates and developed nations and then devolve into global economic depressions (Bello, 2006; Foster and Magdof, 2009).
2. Overproduction. Overproduction crises emerge when the surplus capital available in the global economy is not channelled into production processes due to a fall in profit margins and a slump in effective demand, the latter usually a consequence of wage containment across all sectors of the population (Bello, 2006).
3. Environmental. The degradation of natural resources, climate change and the mercantilization of the environment severely affect the natural world, endangering the material bases for both human production and reproduction (Foladori and Pierri, 2005).

4. Social. Growing social inequalities and the dismantling of the welfare state and the subsistence system accentuate problems such as poverty, unemployment, violence, insecurity and labour precariousness, increasing pressure to emigrate (Harvey, 2007; Schierup et al., 2006).

This crisis in fact questions the dominant style of globalization and, in a deeper sense, the systemic global order, which has failed to acknowledge the value of our main sources of wealth – labour and nature – and has overexploited them to the extent that it has placed civilization itself at risk.

## 5.5 ELEMENTS FOR THE ANALYSIS OF CONTEMPORARY MIGRATION: KEY CONCEPTS

In order to analyse and understand the relationship between development and migration in the context of neoliberal globalization, we must first define two central concepts: unequal development and forced migration.

### 5.5.1 Unequal Development

The new architecture of neoliberal globalization has been promoted through the implementation of structural adjustment programmes in southern nations. These comprise privatization, deregulation and liberalization and have been the tools with which to insert underdeveloped economies into the dynamics of globalization. They dismantle the national productive apparatus, facilitate the penetration of foreign capital and create a massive labour force surplus (Delgado Wise and Márquez, 2007). This process has led to deepening geo-economic and political asymmetries between countries and to growing social inequalities. The deepening geo-economic and political asymmetries between countries entail a growing gap between developed and underdeveloped countries. Capitalist development, however, is not a straightforward dichotomy but a complex system of power relations between regions, countries and localities. The growing social inequalities are expressed in the concentration of capital, power and wealth among an increasingly reduced elite while a growing part of the population suffers poverty, exploitation and exclusion.

The notion of unequal development encapsulates these dynamics of dominance and refers to the historical, economic, social and political processes of polarization among regions, countries and social classes, all of them derived from the dynamics of capitalist accumulation, the international division of labour, the new geopolitical map and class conflict across space and hierarchies.

### 5.5.2 Forced Migration

Although the concept of forced migration is not generalized, it does characterize, to a great extent, current migration flows. The term is habitually used to distinguish between voluntary and involuntary migration and, from a human rights perspective, refers to exiles or displaced populations. However, mechanisms of unequal development lead to the mass migration of dispossessed, marginalized and excluded populations. It is also an involuntary movement on the part of people who are literally expelled from their places of origin in an attempt to find subsistence opportunities in their country or abroad. This also applies to those who cannot find employment in accordance with their skills or capacities in their home country.

In the case of workers with low qualifications, migration entails substantial risks and dangers; it also implies permanent exposure to labour precariousness and social exclusion in receiving nations. As pointed out previously, international migrants are subjected to criminalization, racism and general discrimination, conditions that not only render them vulnerable and marginal but can also effectively imperil their lives. While qualified and highly qualified migrants have considerably more freedom of movement, they are still subjected to ethnic discrimination and labour degradation (Delgado Wise and Márquez, 2009).

Taking four criteria into account – unequal development, human rights, institutionalism and the labour market – we can identify four types of forced migration (Castles, 2003; Delgado Wise and Márquez, 2009; European Commission, 2004; Gzesh, 2008):

1. Migration due to violence, conflicts and catastrophes. Social, political and communal conflicts, natural disasters, infrastructure works and urbanization severely affect communities, families and individuals, to the point that they are forced to abandon their place of origin and even their own country. This is the case with refugees, asylum seekers and the displaced. These modalities, which tend to affect populations in underdeveloped nations, have been acknowledged in international law. Protection instruments are therefore in place.
2. Migration due to dispossession, exclusion and unemployment. Neoliberal globalization has led to permanent social tensions in underdeveloped nations, depriving large sectors of the population of production and subsistence means, forcing them to emigrate in search of better livelihoods. Most current labour migration falls in this category, which is characterized by extreme vulnerability and exploitation. While there are some protection measures in place for this type

- of migration (for example, the 1990 International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families), these are limited and lack effective means of implementation. The category of 'economic migrants', who supposedly travel in a context of freedom and social mobility, ignores these issues and the risks incurred by migrants.
3. Human trafficking. This form of forced migration has increased alarmingly in recent years, becoming a highly lucrative business due to restrictive policies in receiving nations and sub-par living conditions in less developed countries. Human trafficking is associated with coercion, kidnapping and deceit, and includes sexual exploitation and illicit child adoption among other serious human rights violations. The global response to the sustained increase in this form of criminal activity is the United Nations' Convention against Transnational Organized Crime, signed in 2000 in Palermo, and the subsequent Protocol to prevent, suppress and punish trafficking in persons, especially women and children. The terms 'human trafficking' and 'illicit smuggling of migrants' have been erroneously used as synonyms, which is why this category is often included in one of the other groupings mentioned here.
  4. Migration due to overqualification and lack of opportunities. Many highly qualified workers such as scientists, IT researchers, academics, artists and technicians who are unable to find jobs in line with their capacities at home may also decide to migrate to other nations. While some might have jobs and even enjoy decent salaries at home, they nevertheless lack basic resources such as access to project financing, infrastructure, equipment and human resources. They are attracted by the considerably more favourable conditions in developed countries, where they can enjoy better institutional support. While these migrants do not face serious problems when travelling, some will be subjected to labour and salary discrimination in countries of destination.

The first two categories of forced migration are defined in a 'strict sense', since they involve the inequalities fostered by development dynamics, human rights violations, institutional weaknesses and governmental failure to guarantee solutions to economic, political, social and environmental problems in nations of origin. They also imply imbalances in social relations produced in a climate of insecurity, exclusion and poverty (human trafficking is included in this grouping). The use of the term 'forced' in the fourth category is less strict, since this population is not seeking to cover basic necessities but fulfil their professional and intellectual roles. This is

tied to imbalances in the labour market and institutional support in the home country.

In its diverse manifestations, forced migration is a cheap source of labour and thus plays a key role in unequal development and the new global architecture that promotes the 'free market' while restricting the free flow of people.

## 5.6 THE DIALECTIC BETWEEN UNEQUAL DEVELOPMENT AND FORCED MIGRATION

The following four postulates illustrate the dynamics of neoliberal globalization in relation to migration and development (Delgado Wise and Márquez, 2009):

1. Unequal development generates forced migration. In the current capitalist context, large corporations deploy a restructuring strategy that, on the one hand, internationalizes processes of production, commercialization and finance; on the other, it appropriates the natural resources, economic surplus and cheap labour of underdeveloped countries. Lagging development conditions are exacerbated with the implementation of structural adjustment policies by international bodies, leading to increased unemployment and the detonation of forced migration. The latter, in turn, leads to significant population losses and results in a negative net transference of the demographic bonus in countries of origin.
2. Migrants contribute to development in receiving countries in a context of increasing labour precariousness and social exclusion. Developed nations demand vast amounts of cheap, qualified and unqualified labour (including undocumented workers), which places migrants under conditions of increased vulnerability and diminished value. Less qualified migrants, the vast majority, contribute to devaluing labour costs across the board because they work in key sectors linked to the costs of labour reproduction. On the other hand, and in spite of being considered an elite labour segment, qualified migrant workers also constitute a cheap source of labour in relative terms: they earn less than equally qualified peers with legal citizenship. In both cases, the receiving country not only fulfils its labour needs but benefits greatly from the fact that it did not invest in the formation and reproduction costs of these migrants. In sum, migration constitutes a double transference from the sending to the receiving country: a cheap workforce along with formation and social reproduction costs.



3. Migrants contribute to their home country's precarious socio-economic stability. A fraction of migrants' salaries is destined for remittances and ensures the subsistence of family members in places of origin. To a lesser extent, remittances are used to finance small businesses in a subsistence economy. Migrant organizations use collective remittances for the purpose of financing public works and social projects in places of origin. To a lesser extent, migrants with savings or entrepreneurial goals allocate their resources (productive remittances) to the financing of micro-projects in places of origin. The larger portion of remittances, however, is used for family consumption and has a limited multiplier effect, which means that these resources can hardly promote development processes. Moreover and in many cases, they contribute to dependency on foreign labour remuneration and the importing of consumer goods. From a macroeconomic point of view, remittances benefit neoliberal governments that, unwilling to generate development alternatives, use them as a source of currency that contributes to the nation's frail 'macroeconomic stability'. Some countries even use remittances as equity to warrant foreign debt. Given the absence of a real development strategy, migrants are now lauded as the 'heroes of development' and made responsible for a task that should belong to the government but, under the neoconservative precept of a minimal state, remains unfulfilled.
4. The promotion of alternative development as social transformation can prevent forced migration. Ideologically speaking, neoliberal globalization posits itself as inevitable. It is therefore crucial that we theoretically and practically endorse the feasibility of alternative strategies of development. Reverting the asymmetrical power relationships between sending and receiving countries is paramount; this will allow us to identify and counter practices that submerge vast regions of the world into quagmires of inequality, marginalization, poverty, social exclusion and forced migration. A project of genuine social transformation must focus on the root causes of forced migration by creating viable employment opportunities. This will make migration an option rather than a necessity.

## 5.7 CONCLUSION AND KEY ISSUES

The dynamics of contemporary migration flows pose an economic, political, social and geographical challenge. The following five issues are crucial to its analysis: (1) strategic indicators that demystify the relationship between migration and development; (2) human rights, development and

migration; (3) environmental degradation, climate change, development and migration; (4) civil organizations, movements and networks; and (5) comprehensive, inclusive and humanistic public policies.

Given the premises of the alternative approach, we must expand the analytical horizon comprising migration and development in order to understand the context, processes and actors involved in it across countries of origin, transit and destination. The new theoretical perspective must focus on key problems and dynamics associated with the causes, costs and contributions of migration in its dialectical relationship with development. This requires a system of information involving new categories and indicators that can unequivocally reflect those costs and benefits, exposing the myths that underlie the dominant approach. It is also important to evince the role of internal migrations, their link to international flow, and create indicators that monitor compliance with human rights and evaluate migration policy. This will require joint efforts and coordination between civil society, governments and international organizations. The current crisis and growing anti-immigrant sentiment reinforce this need (Canales, 2008; Castles and Delgado Wise, 2008; [Delgado Wise et al., 2009](#); Munck, 2010).

Neoliberal globalization undermines human rights by curtailing the right to development and subjecting the working class to conditions of extreme, life-threatening vulnerability. We must reassess the concept of forced migration and counteract migration policies that appeal to sovereignty and national security, criminalizing migrants and depriving them and their families of human rights. Many current temporary worker programmes exemplify the alleged humane treatment received by migrants, which masks both exploitation and human rights violations. Other relevant areas of inquiry include irregular migration, human trafficking, discrimination, and racist and gender-biased policies; the integrity and security of human rights defenders; new standards in labour rights and the implementation of a fair labour agenda; the applicability of international instruments for the protection of human rights as well as state-binding principles of progressive realization and non-retrogression. From a comprehensive viewpoint and in order to create an alternative approach to development that focuses on human rights, international law must be heeded and states must adhere to it. The dismantling of processes of labour flexibilization and precariousness is also crucial. Labour rights must be validated and include access to decent jobs, which must also encompass the recovery of the social security system and the promotion of human development in countries of origin and destination (Castles 2003; Gzesh, 2008; Munck, 2010; Wihtol de Wenden, 2000).

Climate change is only one aspect in the complex issue of environmental degradation and its impact on migration must be analysed in a wide-ranging context. This aspect involves two confronting approaches that, if taken to extremes, can lead to inappropriate public policies (Castles, 2002). On the one hand, we have an alarmist, almost Malthusian vision that anticipates massive influxes of 'environmental refugees' potentially perceived as a threat to receiving countries (Myers, 1995). This approach suggests large numbers of displaced persons (in the order of tens of millions), but these are clearly speculative given our inability to isolate environmental factors from other economic, social and political causes. The 'climate refugee' category is very difficult to pin down and define. It is also inappropriate insofar as it would expand the current definition of asylum, and this would create problems in the implementation of the United Nations' 1951 Convention Relating to the Status of Refugees. Last and perhaps most importantly, this approach fails to address the underlying causes of migration and has in fact been used by organizations seeking to promote anti-immigration policies in receiving countries (Lonergan and Swain, 1999).

On the other hand, a different approach denies the very concept of an 'environmental refugee' based on the weaknesses of the underlying assumptions it entails (Black, 2001). This approach minimizes the impact of environmental changes such as desertification, the loss of biodiversity and even global warming, with its wide array of consequences. It can also lead to inappropriate public policies.

The concept of forced migration presented in this chapter allows for a more fruitful analysis. By focusing on the phenomena and dynamics of unequal development as the factors underlying forced migration, including that caused by environmental degradation, this approach has two important advantages: it avoids numerical speculation and the trivialization of the negative impact of climate change. In contrast to the above-mentioned alternatives, this approach focuses on the most impoverished groups' capacity to adapt. It is these populations that are most vulnerable to environmental contingencies, both natural and human-made. The capacity to adapt (or lack thereof) is of course related to processes of unequal development and their impact on marginalized population groups (McAdam, 2010).

The construction of an agent of social transformation is crucial to the advancement of an alternative development, human rights and migration agenda. It requires overcoming the subjective, political, racial, national and local divisions at the heart of the migrant community and the eventual creation of a collective stakeholder, one that comprises migrants as well as other social sectors affected by neoliberal globalization. The

transformative potential of this social agent depends on the organizational, institutional and financial capabilities of migrant and pro-migrant movements, organizations and networks. The interaction of these groups with diverse civil society stakeholders that can make useful contributions (for example, unions and academia) is crucial (Gordon, 2009). The inclusion and empowerment of communities of origin is just as important.

Politically speaking, it is vital that these organizations, movements and networks move beyond reactive, defensive and short-term strategies and begin tackling transformative, long-term projects associated with the articulation of a collective, transnational agent for social transformation (Fox, 2005; Milkman, 2006; Munck, 2010).

In the current context of neoliberal globalization and unequal development, public policy processes have been dominated by an agenda and guidelines stemming from migrant-receiving countries. Forced migration, in its diverse forms, is subsumed under a context characterized by deepening geo-economic and political asymmetries and widening social inequalities. There are many complex factors in need of consideration for the design and implementation of policies aimed at promoting comprehensive, inclusive and humanistic development. While we cannot summarize them all here, they should include: (1) regional, mutually supportive and compensatory integration with fair commerce versus asymmetric integration and free commerce; (2) a human rights-based agenda versus a national security-based agenda; (3) free and voluntary mobility versus forced migration; and (4) fair labour standards versus superexploitation. An examination of these elements should be based on a critical appraisal of the requirements for a human rights-based, positive type of circular migration that exposes the human and labour rights violations of existing temporary worker programmes (Southern Poverty Law Center, 2007). Other issues requiring attention include the massive increase of irregular migration in excess of the demand for labour; the increasing incorporation of highly skilled migrant workers from underdeveloped countries and their contribution to the innovation processes of developed nations (Khadria, 2008; Lozano and Gandini, 2009; Xiang, 2007); and problems surrounding return policies and programmes that adversely affect migrants and their families.

The biggest remaining challenge in this regard is to shift attention from the type of migration policies implemented in receiving nations (that is, those based on a security agenda that criminalizes migrants and obscures the nature and causes of the phenomenon) to bilateral and multilateral negotiations based on an agenda of international cooperation and development.

## NOTES

1. See Iosifides (Chapter 2, this volume) for further discussion of the reductionist nature of quantitative epistemology.
2. See Lozano and Steinberger (Chapter 8, this volume) for a review of traditional neoclassical economic approaches in migration studies.
3. It must be pointed out that the categorization of countries according to concepts of development and underdevelopment, centre and periphery is, to an extent, abstract and does not imply a strict dichotomy. Rather, it entails a complex system of power relationships established among regions, nations and localities. In this sense, unequal development appears as an inherent feature of the capitalist mode of production.

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PART II

INTRODUCTION  
TO DIFFERENT  
TECHNIQUES AND  
APPROACHES

