

# Conceptual Framework for the Study of the Subjective Well-being–Migration nexus

Research Report



# MIGWELL

Well-being and Migration:  
The Hungary – Austria Migration Nexus

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## **MIGWELL at a glance**

The MIGWELL project focuses on the nexus of migration and well-being in Hungary and Austria. Using quantitative and qualitative research methods, it seeks to explore the impacts of migration on subjective well-being in the case of Hungarian immigrants in Austria as well as the effects of subjective well-being differences on emigration potential in Hungary. The approach of this project is innovative not only because it links the concepts of ‘well-being’ and ‘migration’, but also because it interprets their two-way causal relationship within one research framework. Since the Covid-19 pandemic might have a profound impact on both pillars, MIGWELL will also reflect on the rapidly changing socio-economic and well-being related issues that have emerged due to the epidemic throughout the life cycle of the project. The theoretical expansion of these concepts and the empirical findings of the project may contribute to more effective policies in both countries.



## 1. Introduction

This concept paper, as the main deliverable of WP1, aims to present and critically analyse the relevant theoretical frameworks of migration and well-being, the two pillars of MIGWELL. It is a presentation of the research state, which reveals the strengths as well as the weaknesses of these concepts and, above all, does not omit critical reflections. This paper aims to serve as a well-founded theoretical basis for the further empirical steps in the next work packages of the project, which is primarily concerned with the migration and remigration of Hungarian citizens to and from Austria, and the consequences thereof for their well-being.

The project is primarily oriented towards the social sciences, but by no means excludes the importance of economic theories and psychological approaches. The latter play a role especially for well-being, a concept that has so far been analysed mainly in terms of social psychology. With the increasing complexity of international migration processes, migration research has also begun to take a greater interest in the ways in which diverse migration situations influence individual well-being. In view of the abundance of related concepts in the scholarly literature, this specification is necessary to guarantee the concise operationalization of the concepts in the form of question batteries in quantitative surveys in the next steps of the project.

The project does not build on one specific theoretical approach; it rather takes appropriate elements from different approaches, which are linked accordingly. After a short review of the relevant theoretical frameworks of migration (Chapter 3) and well-being (Chapter 4), a brief explanation will also be provided of how MIGWELL conceives these concepts and the relationship between them.

## 2. The main types of spatial mobility and the focus of MIGWELL

### 2.1 Migration: an overview of definitions and typologies

Whereas spatial mobility generally refers to the movement of people across different physical locations, *migration* is considered a “relatively permanent movement of individuals, families, and groups from their place of usual residence” to another settlement (Boyle 2009). Distinguished from shorter-distance forms of spatial mobility, which are dominated mainly by housing-related moves, migration tends to take place over longer distances, either within or between countries. The United Nations Department of Economic and Social Affairs defines an *international migrant* as “any person who changes his or her country of usual residence”, excluding movements due to “recreation, holiday, visits to friends and relatives, business, medical treatment or religious pilgrimages”. Persons who are absent from their country of origin for a period of three to twelve months are considered short-term international migrants. If this period exceeds twelve months, they appear in statistics as long-term international migrants (UN 1998: 17). The term “usual residence” is used to refer to the place “at which a person normally spends the daily period of rest, regardless of temporary absence for purposes of recreation,

business, medical treatment or religious pilgrimage or, in default, the place of legal or registered residence” (EC 2007).

There are several other ways of *typifying* migration processes. For instance, migration can be voluntary or forced (see asylum seekers and refugees),<sup>1</sup> regular or irregular. Migration is considered irregular when the movement of persons takes place in breach of the laws, regulations, or international agreements governing entry into or exit from the country of origin, transit, or destination). Beside these legal categories, migration can furthermore be classified according to different motivations: working or enrolling in education abroad, unifying family, and so forth. Based on the direction of movement, we can distinguish between emigration, immigration, return migration (see in detail: Chapter 2.3), re-emigration, second-time emigration, transilient migration, and circular migration (King 1986, Fassmann et al. 2018).

However, a new form of migration has also become prevalent in the last few decades, due to the higher permeability of national borders and new technologies in transport and communication, such as low-cost airlines and web-based VoIP applications, e.g. Skype or Viber. Moving between two countries despite never really leaving and never really arriving, and belonging to more than one community at the same time, instead of living in one country according to one set of national and cultural norms, has been described as *transnational migration* in the literature. This “liquid” form of migration often leads to the permanent splitting of families and the maintenance of two households over a longer time period, the development of hybrid identities, and a high interaction with the countries of origin and destination at the same time (Fassmann 2002, Glick Schiller et al. 1995, Upegui-Hernandez 2014 etc.).

In official statistics, the term “*migration background*” refers to the ancestry of the parents of the persons concerned. (According to Statistics Austria, persons whose parents were both born abroad are defined as people with a migration background.) Similarly, children who arrive in another country together with family members are labeled as the “in-between” or “1.5 generation” in the literature (Schneider and Crul 2012). Although all of these generations would be worth of investigation, the MIGWELL project has been designed to analyse the subjective well-being of Hungarians who have decided to move to Austria or who intend to leave Hungary.

## 2.2 The focus of the MIGWELL project

Therefore, *MIGWELL* focuses on potential stayers and potential emigrants in Hungary, first-generation, permanent (long-term) immigrants in Austria who have arrived from the territory of Hungary<sup>2</sup>, as well as return migrants who have decided to move back to Hungary from

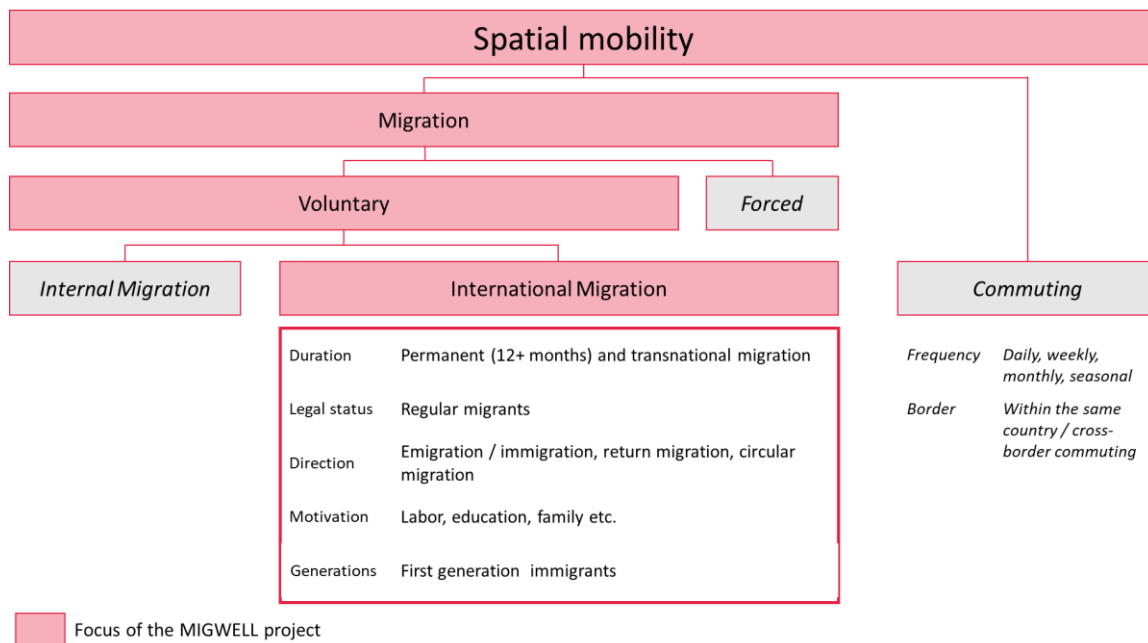
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<sup>1</sup> It must be noted that it is not always possible to distinguish between voluntary and forced migration. Although the lines are routinely drawn to separate forced from voluntary migrants in everyday practice, the boundaries between the two categories in fact are often blurred (Bakewell 2021).

<sup>2</sup> Migrants with Hungarian ethnic identity and/or Hungarian citizenship from other neighbouring countries (Slovakia, Ukraine, Romania, Serbia, Croatia, and Slovenia) do not belong to the main target groups of the project. However, their experience might also contribute to the better understanding of the migration–subjective well-being

Austria. Daily or weekly cross-border commuters are not included. Therefore, studies on this form of spatial mobility will only be mentioned in passing. Similarly, although we are aware of the current immense numerical dimensions and the importance of forced migration, this migration type is deliberately excluded from MIGWELL. However, the project may cover transnational migrants, should we reach a reasonable number of them during the next work packages (Figure 1).

Figure 1. The main types of spatial mobility and the focus of the MIGWELL project (Source: own design)



### 2.3 Return migration

Since Hungarian *return migrants* constitute a target group of the project, it is worth dedicating a subchapter to the conceptualization of the phenomenon. Until the 1970s, migration was typically seen as a linear process, ending with the final, lifelong decision to leave one country and settle in another. Empirical studies started to pay attention to return migration due to the increase in the number of returnees from North America and Australia to Europe and due to the return of guest workers during the economic recession (King 1986). Today, return migration is often seen as a potential means of returning financial, social, and cultural capital and knowledge to the country of origin (Gruber and Németh 2020). Yet, in the literature, considerably less attention has still been paid to decision-making processes in the context of return migration (see e.g. Dumont and Spielvogel 2008, Lados and Hegedűs 2016).

Cerese (1974) has developed a *typology* based on the empirical observations of Italian returnees

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nexus in a Central European context. They will not be strictly excluded from the qualitative interviews but they will represent a minority among the interviewees.



from the USA. “Return of failure” and “return of conservatism” mainly pertain to people who have spent 1-5 and 5-10 years in the target country. The former is predominantly the result of unsuccessful integration into the new society and the existence of strong social ties with the country of origin. Returnees within the second category were typically target earners who migrated with the explicit goal of earning and saving money. Although they mostly succeeded in overcoming their initial difficulties in the host country, they returned with the intention of enjoying a better life in their country of origin. From an economic point of view, the “return of innovation” (after 10-20 years of living abroad) is the best-case scenario for the country of origin. These returnees frequently run transnational businesses and play an important role in connecting their countries of origin and destination in the transnational space (e.g. Driori et al. 2010, Predojevic-Despic et al. 2016). “Returning for retirement” is the fourth category. At the end of their working period, people often decide to return because of nostalgia, their social ties that still exist, and the more affordable housing conditions in their country of origin.

Although Cerase’s typology is a good starting point for further empirical studies, it must be noted that these categories are certainly not universal. Due to its geographical proximity, Austria for instance acts as a kind of “migration laboratory” for Hungarian migrants, since they can easily move back if their migration project should fail. Thus, in this specific nexus, the time frame of the categories may differ remarkably.

Beyond the decisions of leaving vs. staying, or returning vs. remaining in the target country, there always is an additional, personal and/or household-level consideration of several aspects. These may range from family ties to labour-market opportunities. The decision-making process can altogether be seen through the *prism of well-being*. The objective factors and subjective evaluation of well-being, as well as its current and expected levels in the future must be considered (about the conceptualization of the SWB – migration nexus cf. Chapter 5.1 in detail).

### 3. Relevant migration theories

Migration is driven by various complex factors: earning a better living, finding a safer and more agreeable environment to live in, bettering one’s career perspectives, searching for new experiences, or joining one’s family or ethnic network abroad. The factors motivating people to migrate have been explored extensively in extant literature. However, there is no general theory that explains the initiation and perpetuation of migration. Instead, as research on migration is intrinsically interdisciplinary and because each discipline considers different aspects of population mobility, a multitude of theories, explanatory models, and empirical approaches have emerged (e.g. Arango 2000, Bretell and Hollifield 2014). These concepts help us to understand why some people migrate from a certain country or region and others do not. They furthermore explain the individual and external factors that affect such decisions to move or stay, as well as the circumstances under which migration can be associated with benefits – or costs – for the migrants and their places of origin and destination. Each of these models

emphasizes different aspects of the relationship. Sorting out which of the explanations are useful in the concrete research context therefore “is an empirical and not only a logical task” (Massey et al. 1993: 455).

According to De Haas (2021), migration theories can be ordered into three main groups. The push–pull approach, the neoclassical models, and the migrant network theory, for instance, are situated within the *functionalist* paradigm, according to which migration is essentially an optimization strategy of individuals or families making cost–benefit calculations. The world systems theory and the dual labour-market theory, among others, belong to the *historical-structural paradigm*, which interprets migration “as being shaped by structural economic and power inequalities, both within and between societies, as well as the ways in which migration plays a key role in reproducing and reinforcing such inequalities” (De Haas 2021: 4). More recent theories, such as transnational (Vertovec 2009), diaspora (Safran 1991), and creolisation (Cohen 2007) theories – which focus on migrants’ everyday experiences, perceptions, and identity – can all be situated within the *symbolic interactionist* perspective.

There however are many other ways in which migration theories can be classified. One may ask, for instance, whether they focus on the initiation or the perpetuation of migration, or one may consider the main discipline that they have originated from: sociology, economy, geography or demography (Castles et al. 2014, Faist 2000, Massey et al. 1993). In this paper, we principally follow a classification according to the level on which these migration theories operate. From this point of view, there are micro-, meso- and macro-level approaches (Table 1). We briefly summarize the relevant theories for MIGWELL below, but the list is illustrative, rather than exhaustive. We will place greater emphasis on micro models, which are more directly related to the topic and methodology of our research project.

Table 1. Classification of certain migration theories according to their level of focus  
Sources: Massey et al. (1993), Wickramasinghe and Wimalaratana (2016)

Micro	Meso	Macro
<ul style="list-style-type: none"> <li>• Push-and-pull model</li> <li>• Neo-classical micro theory</li> <li>• New economics and sociology of labour migration</li> <li>• Behavioural models</li> </ul>	<ul style="list-style-type: none"> <li>• Network theory</li> <li>• Cumulative causation theory</li> <li>• Institutional theory</li> </ul>	<ul style="list-style-type: none"> <li>• Push-and-pull model</li> <li>• Neo-classical macro theory</li> <li>• Dual labour market theory</li> <li>• World system theory</li> <li>• Migration cycles</li> </ul>

### 3.1 Push-and-pull model

Ernest Ravenstein's study titled *The Laws of Migration* (1889) is widely considered the earliest migration theory. His empirical observations from England and Wales provided evidence of a spatial gravity model: people tend to move from low income to high income areas, while the volume of migration decreases as physical distance increases. Ravenstein stated, among others, that economic factors constitute the main cause of migration, that population movements are bilateral (migration flows produce compensating counter-flows, although not in the same volume), that migration occurs mostly in stages instead of in one long haul, and that long-distance migrants tend to choose the industrial, commercial centres of a country as their destination.

In 1966, Everett Lee reformulated Ravenstein's theory. In this landmark study, he pointed out that migration is driven by so-called *push* and *pull factors*. In general, unfavourable external conditions (e.g., low wages or high unemployment) cause people to leave a place, while the target location is determined by favourable economic conditions, the pull factors. However, the decision to migrate is also affected by “intervening obstacles” (such as distance, physical barriers, immigration laws, etc.), as well as personal factors. Lee emphasized that the migration process is selective, because people's ability to overcome intervening obstacles depend on their personal characteristics, e.g., age, gender, social class, and education level. In the push-and-pull “parlance”, migrants responding to positive factors at the destination are positively selected, while migrants responding to negative factors in the region of origin are negatively selected. Therefore, a migrant population is rarely representative of its country of origin. The characteristics of migrants tend to be intermediaries between the characteristics of populations at the places of origin and the place of destination.

### 3.2 Neoclassical models

The neoclassical model is among the best-known theories of international migration. The macro and micro variations of this theory are not fully independent from the push-and-pull model, but they provide different ways of breaking down the complex subject of migration into analytically logical units.

According to the *neoclassical macro model*, the direction and volume of migration is principally determined by wage inequalities and labour market imbalances (e.g. Harris and Todaro 1970, Todaro 1976, Zimmermann 1994). Although Harris and Todaro initially developed this model for explaining internal rural-urban migration, it can also be applied to international migration. In some countries, labour is scarce in relation to capital, and the wage level is high, while in other countries the opposite obtains. The assumption is that migration results from the uneven geographical distribution of labour and capital, and that the differences in wages cause people from low-wage countries to move to the high-wage countries. As a result, the supply of labour decreases and wages rise in the capital-poor countries, while the supply of

labour increases and wages fall in the capital-rich countries. At the same time, capital moves in the opposite direction (Massey et al. 1993). In the long run, this process would theoretically result in a convergence between wages in the sending and receiving areas, and thus the main motivation for migrating would disappear. Therefore, literature often describes this model as a “neo-classical equilibrium perspective” (De Haas 2008: 4).

The *neoclassical micro model* is based on a similar conceptual pillar (differences in earnings and employment are responsible for international migration) but it focuses on individual choices (Sjaastad, 1962, Todaro 1969, 1976, Todaro and Maruszko 1987). According to this approach, people are rational actors who move if a cost-benefit calculation leads them to expect a positive net return from movement. This decision-making process can be summarized analytically by a mathematical equation. People estimate the difference between the expected incomes in the countries of origin and destination, and place it in relation to migration costs. If the expected gains are greater than the costs, and if they still have enough years before retirement, the rational choice is migration (Borjas, 1990, Fassmann et al. 2018). To summarize, international migration flows in the geographic space in fact are the cumulative results of individuals’ rational decisions based on calculations of expected benefits and costs.

The decision-making process is often interpreted within the *human capital* framework (Sjaastad, 1962, Poot et al. 2009), which can explain the selectivity of migration too. Considering that individuals are different in terms of age, gender, education, experience, language skills, etc., there also are differences in the extent to which they might gain from migrating, “that is, they can expect diverging returns on their migration investment” (De Haas 2008, p. 6). It furthermore means that the probability of migration differs between individuals and certain social groups, depending on their human capital characteristics.

The *life course approach* is another prism through which micro-level decision-making is often seen (Fassmann et al. 2018). Although every individual life follows its own course, similar patterns can be observed in the timing of events that are influenced by societal and biological factors (Wingens et al. 2011). Special attention has been paid to gender-specific differences, seeing that women’s life course patterns may significantly differ due to, e.g., childbirth and childcare (cf., e.g., Katz and Monk 1993, Krüger and Baldus 1999). Three main life-course transitions seem to trigger migration: the transition from school or higher education to work, from unemployment to employment, and from living at home to living independently, which refers to the establishment of an own home and is often connected with partnership formation or having children (King et al. 2016). Thus, according to the age-specific migration model of Bernard et al. (2014), the probability of migration is particularly high between the age of 20 and 35.

In the past few decades, the Harris-Todaro model was refined by several scholars (e.g. Borjas 1990, Bauer and Zimmermann 1998), who included further factors that influence the relationship. Expected incomes for instance do not depend only on earnings at the destination but also on the probability of getting an appropriate job, while the expected costs include not

only financial but also immaterial, e.g. psychological, costs.

Considering that the push-and-pull concept and the related neoclassical models provide coherent frameworks to conceive the motivations triggering migration as a mass phenomenon, they remained dominant in public thinking as well as in development practices worldwide, and they are *still popular* in the literature, too (e.g. Fassmann et al. 2018, Zimmermann 1994). Another advantage of the push-and-pull model is its applicability on both micro- and macro-level analyses and its potential linkages to official statistics (e.g., comparing unemployment data in the countries of origin and destination).

However, there are *limitations* to these concepts. The push-and-pull idea is widely considered a static, descriptive and rather post-hoc tool to explain migration processes, which does not specify, for instance, how migration affects initial structural conditions. Furthermore, people are seen essentially as “victims” who passively react to macro-level forces that function as the causal determinants of migration. Several social scientists furthermore criticize the neoclassical model on account of its utilitarian approach. Without being exhaustive, the critical voices pointed out that the concept oversimplifies the decision-making process, assuming that the potential migrants are rational individuals who have perfect knowledge of the costs and benefits of migration. Moreover, it largely ignores the existence of market imperfections and other structural constraints on development, particularly in the context of developing countries. Skeldon (2014) criticized the neo-classical theory as a historical and Eurocentric approach. It finally fails to deal with constraining factors such as government restrictions on migration, and cannot explain the simultaneous occurrence of immigration, emigration, and return migration between two particular areas (De Haas 2008, Castles et al. 2014).

### 3.3 A mosaic of contemporary migration theories

In the last quarter of the 20<sup>th</sup> century, international migration has undergone deep changes. While post-war global migration was comprised mainly of “large numbers moving from particular places to particular places” (from Algeria to France, from Turkey to Germany, from Mexico to the USA, etc.), we have witnessed even more people “moving from many places to many places” since the 1980s (Vertovec 2010). The increasing complexity of international migration in terms of source and destination areas, migration channels, and the social characteristics of people who move has led to a growing interest in the topic from both the political and the scientific spheres, and to the development of a colourful *mosaic of contemporary theories*. In the next sub-chapters, we will briefly review the most important concepts that are relevant to MIGWELL.

### 3.4 The new economics and sociology of migration: a micro-level approach

In contrast to the neoclassical models, the new economics and sociology of labour migration (NELM) underlines that migration decisions are usually made by *families and households*, instead of isolated individuals (Stark and Bloom 1985, Stark 1991, Taylor 1999 etc.). It is essentially a micro-level theory that places greater emphasis on people's efforts not only to maximize their own gains, but also to minimize risks to family income and to overcome capital constraints on family production activities (Stark and Levhari 1982, Stark 1984). To do that, households, particularly in developing countries, are interested in overcoming labour-market failures and diversifying their resources. This frequently results in transnational family formation. "While some family members can be assigned economic activities in the local economy, others may be sent to work in foreign labour markets where wages and employment conditions are negatively correlated or weakly correlated with those in the local area. In the event that local economic conditions deteriorate and activities there fail to bring in sufficient income, the household can rely on migrant remittances for support" (Massey et al. 1993: 436). Thus, international migration and local employment are not mutually exclusive options.

The new economics and sociology of migration refuses the assumption that income is a homogeneous good that has the same effect on utility for everyone, regardless of their socio-economic status. The leading theorists of NELM pointed out that households do not only aim at increasing income in absolute terms, but also at improving living standards – and reducing *relative deprivation* – compared to other households and certain reference groups (Stark and Yitzhaki 1988, Stark and Taylor 1989, Stark 1991). (Concerning reference groups see further Chapter 5.1.2). This means that the probability of migration may grow or decline due to changes in the incomes of other households (Massey et al. 1993: 438-439).

The wage or employment differences between two selected countries do not necessarily explain the direction and volume of migration flows per se. Thus, international movement would not stop when these gaps disappeared. The likelihood of a positive migration decision depends mainly on the households' relative position within society. Even a decreasing average income gap between two countries may be coupled with intense emigration if relatively poor households do not share in the economic development of the sending country. Although households at the lower end of the income distribution spectrum are more likely to migrate, this prediction does not hold for the most deprived households, because they cannot afford migration (Stark 1991). Instead of reactive individuals responding simply to the economic situation, we should rather see them as persons who are able and ready to act in order to improve the quality of life of their households.

The NELM approach presents several improvements in comparison with neoclassical models. However, there is a *debate* whether its ingredients constitute a distinct, coherent theory, or whether it should be seen only as a "critical, sophisticated variant of neoclassical theory" (Arango 2000: 288). Faist (2000) highlighted some further shortcomings of NELM, such as its being biased towards the sending side, and its limited practical applicability in the case of less



established migration contexts. Irregular migrants, refugees, and asylum seekers also challenge the general assumptions of the model. Further, NELM generally ignores household concerns, and does not provide an adequate explanation for the movement of complete households (Arango 2000).

### 3.5 Macro-structural models

Beside the neoclassical macro approach, some more recent models also emphasize the *macro-structural factors* of migration. These concepts generally ignore micro-level decision processes and focus on forces operating at higher levels of aggregation. For instance, the dual labour-market theory links immigration with the structural requirements of modern industrial economies, while the world-systems theory sees immigration as a natural consequence of economic globalization and market penetration across national boundaries.

#### 3.5.1 Dual labour-market theory

The concept of dual economy had *different meanings* in the literature at different times. In its original sense, it described the system of relations between traditional peasant farms and modern industrial-service formations, applied to the cases of third-world economies (Wertheim 1968). According to another interpretation, it refers to the dichotomy of the formal – informal economy, which is closer to the distinction between the first and second economies that has become established in Hungary as well (Offe 1987). Certain authors focused on the differences between large and small firms (Hodson-Kaufman 1982, Averitt 1968). Large companies with established bureaucratic hierarchies and vertically integrated production processes can be characterized according to diversification across industries, regions, and national frameworks, using progressive technologies, by ensuring ownership and control over raw material production and distribution companies. In contrast, the “other economy” is represented by small firms dominated by individuals or families that supply a limited market, so that their production and marketing strategies do not reach those of the centre. This is linked in the literature to the question of the existence of a dual labour market (Doeringer and Piore 1971, Gábor 1997). The fundamental difference between the primary and secondary labour markets is thought to be captured and linked to the dual economy in the sense that large companies have an internal labour market, while small ones are only related to the occupational labour market.

*In migration studies*, the dual (or segmented) labour-market theory refers to the dualistic economies of the developed countries that are structured to require a certain level of immigration (Piore 1979). In these economies, there is a primary sector for secure, well-paid work and a secondary sector for low or unskilled jobs involving relatively poor working conditions. While native inhabitants take up more attractive jobs, the secondary jobs are frequently occupied by immigrants. Beside the ageing of the native population, structural inflation is also responsible for the growing demand for an external labour force. It is coupled

with the rise of proportional wages in the secondary sector, which makes these jobs unattractive for native workers.

Generally, the dual labour-market theory does not conflict with the neoclassical approaches and NELM, but it presents a demand-driven concept. It suggests that the main driver of international immigration is, in fact, the developed economies' recruitment of a foreign labour force to fill jobs on the secondary labour market, which is necessary for the functioning of the overall economy (Jennissen 2004). This pull factor has a stronger explanatory power than do the international wage differentials or the wishes of individuals or households – as potential migrants – in the countries of origin (Massey et al. 1993).

This is the main source of *criticism*: the dual labour-market theory largely ignores the push factors in migration systems. Secondly, at the beginning of the 21st century, labour recruitment is less important than it used to be some decades earlier. The theory furthermore cannot explain different migration rates, i.e. “why different advanced industrial economies, which have similar economic structures, exhibit rates of immigration that may vary by a factor of ten, say between Denmark and Norway on the one hand and Switzerland or Canada on the other” (Arango 2000: 290).

### 3.5.2 World-systems theory

The world-systems theory (Sassen 1988, 1991) argues that international migration is a by-product of global capitalism, created by direct foreign investment in developing countries and the disruptions that such investment brings. On a global scale, most international migrants move from the periphery (poor countries) to the core (rich countries) because factors associated with industrial development generated structural economic problems, and thus push factors, in the Third World. The routes of major international migration corridors are determined by former colonial relationships. As a *historical-structural paradigm*, world-systems theory mainly focuses on “how powerful elites oppress and exploit poor and vulnerable people, how capital seeks to recruit and exploit labour and how ideology and religion play a key role in justifying exploitation and injustice by making them appear as the normal and natural order of things” (De Haas 2021: 4). The world-systems theory does not consider the nation-state as the primary unit of analysis, and it demonstrates a complex and nuanced model of global inequalities (Coccia 2019).

Yet it has been *criticized* for presenting too many broad generalizations and for failing to present a falsifiable hypothesis (Massey et al 1993). Because of its wide scope, there still is a lack of empirically grounded studies justifying the hypotheses. In putting forward the notion of a unified world connected by networks of global capital, it makes two assumptions that do not always hold true. On the one hand, the world-systems theory overemphasizes the role of globalization and capitalism. On the other hand, even though it claims to be a unified approach combining the spheres of economy, politics, and society, it ultimately relies too heavily on



economic causes of migration, while largely ignoring other factors, for instance social networks and socio-cultural moderators (Frank and Gills 1993). As Massey et al. (1993) underlined, to test the world-systems theory one should include indicators of prior colonial relationships, the prevalence of common languages, the intensity of trade relations, the existence of transportation and communication links, the relative frequency of communications and travel between countries, etc.

### 3.5.3 Migration transition model

In the migration transition model, Zelinsky (1971) has described how *migration patterns change* over time with the change of economic and political systems. This concept is the extension of the “classic” demographic transition model with five distinct phases. A pre-modern traditional society is characterized by high fertility and mortality rates and slow natural increase, while the extent of permanent migration is generally low. In an early transitional society, the growing concentration of employment in urban centres induces distinguishable rural-urban migration. Whereas fertility rates are still high, industrialization is coupled with the improvement of public health and reduced mortality rates. In a late transitional society (stage three), population growth slows down considerably due to lowering fertility rates, while spatial mobility becomes more intense. New forms of spatial migration appear, such as circular migration patterns, commuting, retirement migration, etc. (Fassmann 2011: 80). In general, urban-to-urban migration overtakes rural-to-urban migration.

Today, all European countries find themselves in the 4<sup>th</sup> or 5<sup>th</sup> phase according to Zelinsky’s model: they belong to the “advanced” or “super-advanced” societies. Stage four is characterized by the movement of people within metropolitan regions: from city to city and from city to suburbia. The rate of natural increase is close to zero. In stage five, the size of the post-industrial society decreases in absolute terms. Apart from the earlier movements of people within agglomerations, urban-to-rural migration becomes more important on account of better transportation and new telecommunication technologies (internet, home office).

### 3.5.4 Migration cycles

As Fassmann et al. (2014) have underlined, international migration seems to follow partially overlapping and partially time-lagged migration cycles. The migration cycle theory can be considered a revised version of the transition model, which focuses on the process of the transformation of emigration countries into immigration countries, and of the adaptation of their social and legal systems to the new conditions (Fassmann and Reeger 2012: 66-68). The specific element of the model is the *gradual accommodation* to the new migratory circumstances, affected by changes in demography, economy, the labour market, etc. In the initial phase, the demographic situation long remains relatively constant, and emigration is typically more important than immigration. In the transition stage, a former emigration country

gradually becomes an immigration country, without the “official” acknowledgment of this transition in the political realm. In the adaptation stage, the legislative gap concerning migration and integration issues decreases, and immigration becomes acknowledged as a necessary supplement to the economic growth and the demographically diminishing labour market. “A new political rationality emerges by integrating a means of controlling international migration into a differentiated legal system” (Fassmann et al. 2014: 24-25).

Fassmann and Reeger (2012) concluded that most European countries seem to be developing in a similar direction and that countries in the southern and eastern parts of the continent will in time also become immigration countries. Among the key factors of entering the migration cycle, they highlighted demographic and economic circumstances, the segmentation of a developed labour market into a primary and a secondary sector (see again the dual labour-market theory in Chapter 3.5.1), and modes of regulation concerning international migration.

According to Engbersen (2012), this “historical, path-dependent approach” *fails to explain* the new, liquid forms of contemporary migration flows to Western Europe. Current intra-EU migration patterns differ remarkably from earlier ones because Central and Eastern European migrants have more freedom “to develop their own migration trajectories than in the pre-EU enlargement period with its restrictive West European migration regimes” (ibid: 98). Many of them do not settle permanently but move back and forth from their source country to receiving countries. Since the official statistical data are inadequate, and liquid migration is more unpredictable, new research designs would be necessary to document these flows, and more flexible policies are needed to deal effectively with the new patterns of “lasting temporality” (Grzymała-Kazłowska 2005).

### 3.6 Network theory: a meso-level approach

Beside macro-structural impacts and micro-level circumstances, the intermediate level has also been gaining increasing attention in the literature. Among the so-called meso-level factors, the response of *national and local policies* to macro-economic, macro-environmental and recently global epidemiological processes (e.g. Guadagno 2020), as well as certain *migration steering institutions* such as the International Organization for Migration (IOM) or the UN Refugee Agency (UNHCR) may also affect migration processes. *Social networks* also play an essential role in stimulating migration by reducing the risks of migration, e.g., getting to know about possibilities of working or studying in a foreign country. In this chapter we will focus on network theory, which focuses on the explanation of the “perpetuation”, instead of the “initiation” of international migration (Massey et al. 1993).

According to this hypothesis, government policies and other macro-structural factors shape geographically bundled pathways, linking particular social groups and places over space. Once such initial patterns are set, migrant networks and feedback processes known as “cumulative causation” tend to give migration processes their own momentum and thereby reproduce such

patterns (Massey 1990, De Haas 2021). Thus, migration forges networks which then feed the very migration that produced them. These networks can be interpreted as “sets of interpersonal ties that link migrants, former migrants, and non-migrants in origin and destination areas through the bonds of kinship, friendship, and shared community origin.” (Massey 1988). The network itself *emerges as an actor* in the migration process because it influences migrants’ decisions regarding their migration destinations.

Network effects can be classified as first-order feedback mechanisms, which are endogenous to the migration process itself (De Haas 2010: 1590). Networks influence both the scale of migration and the sorting of migrants across countries, as they provide an “incentive to replicate the destination choices of earlier migrants” (Bertoli, 2010: 262). Migration processes practically rise above the conditions that had originally caused them. They tend to develop an independent existence, among other things due to network formation (Light et al. 1990).

The concept of networks includes the assumption of a *risk-diversification model* and addresses the cumulative causes of migration as a result of reduced social, economic, and emotional costs of migration pursuant to the formation of migration networks (Light et al. 1990). These provide support to would-be as well as newly arrived migrants in their new context. Such support could take the form of financial help, practical information that eases the migration process, job opportunities, etc. (Massey et al. 1993). According to this model, families allocate labour among their members within the constraint of their own needs and aspirations in a cost-efficient and risk-minimizing way. Given that choice, the reduced cost of migration enhances the number who can and will choose to leave, thus increasing the volume of migration (Van Meeteren and Pereira 2013). Therefore, whatever macro-societal political or economic conditions may initially have caused migration, expanding migratory process becomes “progressively independent” of the original causal conditions.

Much of the existing literature has focused on the ways in which strong ties to the destination community can facilitate migration by providing access to information about jobs (Munshi 2003, 2014, Borjas 1992) and material support for recent arrivals (Munshi 2014). The role of the home network is ambiguous. On the one hand, robust risk-sharing networks can partially provide insurance against the risk of temporary migration (Morten 2015), making it easier for people to leave. On the other hand, strong source networks can also discourage permanent migration if migrant households are subsequently excluded from risk-sharing networks.

Because it introduced a sociological dimension, network theory has improved the mechanical and economic push-and-pull models as well as the world-systems concept (De Haas 2010:1587). However, although there is general consensus that social networks play an important role in migration decisions, the exact nature of this role is still unclear. This *ambiguity* stems from a lack of reliable data on both migration and the structure of social networks (Blumenstock and Xu Tan 2016). Existing research explains the expansion of established migrant networks, but generally fails to explain their initial, selective creation and different trajectories. Through its focus on networks, this research has obscured migration-facilitating

feedback mechanisms operating through changes caused by migration in the sending and receiving contexts.

Van Meeteren and Pereira (2013) *criticized* that the central argument of network theory is largely circular, assuming that migration continues ad infinitum. Thus, it provides little insight into migration-undermining feedback mechanisms that can lead to the breakdown of network systems over time (De Haas 2010:1612). Other critiques of this approach have pointed to the relevance of ties beyond community, such as employers, government officials, traffickers, and migration brokers (e.g. Krissman 2005:4 ff.). Elrick and Lewandowska (2008: 718), for example, found that “agents” are significant actors in migrant networks, who can be regarded as perpetrators of migration within these networks. Collyer (2005: 699ff) emphasized that social network theory cannot explain migration flows of refugees and asylum seekers at all.

### 3.7 Aspirations and capabilities: a meta-theoretical framework

Based on his empirical observations in Morocco, De Haas (2021) pointed out that although local living conditions improve significantly, people’s general life aspirations may increase even faster. The growing aspirations – and, in parallel, the growing capabilities – to migrate seem to be responsible for an increasing number of emigrants “despite, or paradoxically rather because of, significant improvements in local living standards”. This line of thought does not fit within the mainstream migration models.

This meta-theoretical framework conceptualizes different forms of migration as a function of *aspirations*<sup>3</sup> and *capabilities* to migrate. While “migration aspirations are a function of people’s general life aspirations and perceived geographical opportunity structures”, migration capabilities “are contingent on positive (freedom to) and negative (freedom from) liberties” (De Haas 2021: 17). These are conceptually distinct but empirically interconnected notions. For instance, improved education and growing media exposure may increase migration aspiration because they expand pupils’ awareness of alternative lifestyles and the relative nature of wealth. In other words, the access to information per se tends to change people’s ideas about the “good life”. In this way, increasing capabilities can increase aspirations.

According to the aspirations-capabilities framework, migration should be seen as people’s capability to choose where to live – including the option to stay – rather than as the act of moving itself. Therefore, moving and staying are, in fact, complementary manifestations of migratory agency. As De Haas (2021: 30-32) argued, the research focus on people’s migratory aspirations and capabilities would help us understand better how the processes of social transformation and development shape international migration patterns. In this meta-theoretical

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<sup>3</sup> As De Haas has emphasized, migratory aspirations have two broad dimensions: instrumental (means-to-an-end) and intrinsic (i.e. well-being-affecting).

framework, the interconnection between migration and well-being is stronger than any other migration theories in the past (see further: Chapter 5.2.3).

### 3.8 Migration theories and their potential expansions

Contemporary migration theories play an essential role in understanding international migration patterns and the decision-making processes behind them. However, as Arango emphasized (2000: 293), the theoretical attention should shift from searching the causes to investigating other relationships of international migration in the future. These relationships could include political factors (e.g. admission policies that considerably shape the direction and volume of migratory flows), cultural consequences (e.g. the costs of cultural adaptation or the modes of migrant incorporation), or societal transformations, including changed family and kinship ties, transnationalisation, etc. One of the potential directions of this theoretical expansion might be a stronger linkage between the concept of migration and the concept of well-being.

## 4. Conceptual frameworks of well-being

From the 1950s onwards, concern has been growing that the dominant frameworks in economics cannot address the challenges of our society in a rapidly changing world adequately. The insight that a narrow focus on economic factors and some widely used indicators such as GDP do not reflect people's welfare has played a key role in the rise of the concept of *well-being* (Stiglitz et al. 2009, OECD 2011, Adler and Seligman 2016, Coulthard et al. 2018).

The word itself is not new at all. It has been used loosely and abstractly for centuries (Milner-Gulland et al., 2014). The roots of the concept dating back to Aristotle, later revived especially by Bentham (Aristotle 2009, Bentham 2013). During the last decades of the 20<sup>th</sup> century, the general interest in well-being research grew remarkably (see e.g. Easterlin 1974, Diener 1984, Kahneman et al. 1999), and the topic received additional attention following the final report of the Commission on the Measurement of Economic Performance and Social Progress, chaired by Amartya Sen, Joseph Stiglitz, and Jean-Paul Fitoussi (Stiglitz et al. 2009). In the wake of the global financial crisis, the world-famous economists emphasized the urgent necessity of shifting the focus of policy makers' and scientists' attention from production and growth to a concern for sustainable human well-being. However, without conceptualization, the term might represent a multitude of ways in which well-being is conceived, and this is a potential source of confusion and misunderstanding.

The Stiglitz report stimulated initiatives around the world to develop a coherent framework for the understanding of well-being (see e.g. Allin and Hand, 2014, McGregor and Sumner 2010, OECD 2011, UK ONS 2011), and an increasing number of statistical agencies have launched targeted surveys to measure it. Although there is still no universally accepted theoretical framework, the views that well-being must be understood as multidimensional, and that apart

from the objective aspects of living conditions, it must be considered how people feel about their lives – i.e., their subjective well-being (SWB) – seem widely accepted as common denominators.

#### 4.1 Objective indicators approach

The attempts to quantify well-being initially relied on easily measurable objective components that reflected people’s life circumstances on a national level. The idea of compressing information on economic and social attributes *into one composite index* date back to the mid-20<sup>th</sup> century (see e.g. Bauer 1966). The popular metrics, such as the Physical Quality of Life Index (Morris, 1979), the Human Development Index, HDI (UNDP 1990), the Human Poverty Index (UNDP 1997), the Multi-Dimensional Poverty Index, MPI (Alkire and Foster 2011) or the Index of Sustainable Economic Welfare, ISEW (Daly and Cobb, 1989) are good examples of these efforts. Most of these indices have been suggested to replace or supplement GDP as the key indicator for economic policy worldwide. Aggregating various objective indicators (e.g. in the case of HDI: gross national income per capita, life expectancy at birth, mean years of schooling and expected years of schooling) across different domains is a shared characteristic. These are not explicitly well-being measures but they already deal with a limited range of factors that might be relevant for well-being.

From a narrow focus on objective measures of development or welfare, the indicators have become more complex and multidimensional over the last decades, expanding to include subjective components (reviewed in King et al. 2013). Indices such as the Happy Planet Index, the National Well-being Index, and the Better Life Index represent transitions toward integrated well-being frameworks (see Chapter 4.3) because they already contain life satisfaction or happiness data as subjective elements. However, they place strong emphasis on quantitatively measurable, objective dimensions, and they still aim to provide one or only a few comparable indices on a national level.

In 2006, the New Economics Foundation introduced the *Happy Planet Index* (HPI) by aggregating life expectancy at birth, ecological footprint per capita, and subjective life satisfaction (see e.g. Marks et al. 2006). Conceptually, it approximates multiplying life satisfaction and life expectancy and dividing that by the ecological footprint. The index is weighted to give higher scores to nations with lower ecological footprints. In the same year, Vemuri and Constanza (2006) published the *National Well-being Index* (NWI). One of the best-known indicators is the *Better Life Index* (BLI), which relies on best practices for building composite indicators (OECD 2008; see in detail: Chapter 4.3.1).

Although well-designed composite indices are useful for distilling complex topics into easy-to-communicate numerical values, they have limitations and they “cannot be used for policy evaluation” per se (OECD 2011: 26).



## 4.2 The evolution of the concept of subjective well-being

Beside the relatively easily measurable objective components of well-being, research on the subjective factors has also been gaining increasing attention over the past decades (Diener 1984, 1994, Easterlin et al. 2010, Kahneman and Krueger 2006 etc.). *Subjective well-being* (SWB) generally captures people’s thoughts and feelings about the quality of their life circumstances. It is usually measured according to psychological responses, such as life satisfaction, autonomy, social connectedness, or personal security (Diener 2012, Ryff and Keyes 1995).

Although notions such as “happiness” have been widely recognized as central elements of quality of life in everyday parlance, they were deemed beyond the scope of statistical measurement until recently. Over the last three decades, an increasing body of evidence has shown that the slippery term of subjective well-being can be operationalized and measured in practice. The investigation requires quantitative as well as qualitative methods (e.g. Camfield et al. 2009, Diener and Suh 1997). The international surveys and the scientific investigations based on them are able to support policy-making because they go beyond objective information about living conditions and resources, and see well-being through the eyes of the people.

The evolution of the concept has entailed numerous interpretations since the 1970s, when the first attempts were made to associate happiness and satisfaction with welfare (Easterlin 1974, Scitovsky 1976). Since then, the approaches and methods aiming at understanding what people believe they need in order to achieve a good quality of life, and measuring their degree of satisfaction with the extent to which these needs are met, have become more sophisticated (King et al. 2013, McGregor et al. 2009, Veenhoven 2008 etc.). While the terms “utility”, “pleasure”, “happiness” and “subjective well-being” were used more or less interchangeably in the past,<sup>4</sup> today there is a general agreement that subjective well-being should be “an umbrella term for the different valuations people make regarding their lives, the events happening to them, their bodies and minds, and the circumstances in which they live” (Diener 2006). The following paragraphs summarize the most important approaches that focus on the cognitive, affective, or psychological elements of subjective well-being.

### 4.2.1 Happiness approach

The happiness approach and the capabilities approach provide different answers to the question whether happiness is an ultimate goal or just one component of a good life. Within the happiness approach there are two main streams of scientific investigation.

The *hedonic* interpretation of subjective well-being relies on the utilitarian concept of pleasure and it is frequently operationalized in terms of life satisfaction and affects. The *life satisfaction* interpretation is cognitive as well as evaluative and requires of the individual to make evaluative statements about different areas of life and about life as a whole (Boyce et al. 2010, Christoph

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<sup>4</sup> On their differences see Camfield and Skevington 2008 or Selezneva 2011.

2010, Dummludag, 2014 etc.). Satisfaction is usually understood a lasting state of well-being. *Happiness* is closer to the terms ‘affect’ or ‘affective well-being’ used in psychology literature (Di Fabio and Palazzeschi 2015, Graham 2009, Layard 2005, etc.). Positive and negative emotions reflect a more corporeal and transitory state of well-being, which are typically surveyed with reference to a shorter timeframe, for instance the most recent two weeks. Nevertheless, it is important to underline that satisfaction and emotions can be separated in theory, but they might be interrelated in practice, since people’s emotional experiences influence their evaluation of life satisfaction (Dragolov et al. 2018). As Kahneman et al. (1999) summarized: in a hedonic approach, subjective well-being can be seen as an index of psychological wellness, while happiness refers to the accumulated moments of experiencing pleasure, and the absence of pain (Diener et. al 1999, Selezneva 2016).

*Eudaimonic* well-being is expounded in the tradition of humanistic psychology. This component of SWB does not correspond to one internal state only in the way that emotions or satisfactions do; rather, it utilizes individuals’ self-reports on a broader suite of elements that are necessary for people to flourish and to fulfil their potential. Eudaimonic well-being reflects the feeling of meaning and purpose in life, accomplishment, as well as the aspects of belonging, self-esteem, and self-actualisation (Clark et al. 2008, Di Fabio and Palazzeschi 2015, Vittersø 2016). As Ryan and Deci (2001) pointed out, the eudaimonic approach is based on the view of people living in accordance with their true self (daimon) and getting material and non-material rewards while constructing a good life. “Some of the actions might produce pleasure (happiness), but not enhance well-being if the actions contradict the daimon” (Selezneva 2016). Migration can be interpreted as an escape from an anomic society (which can manifest itself in status discrepancy) or as an innovation, as finding new means for reaching goals in society (Merton 1957).

Some analysts, such as Diener (1984), Kahneman et al. (1999), or Kahneman and Krueger (2006), tend to use the hedonic approach, while others opt for a definition that includes measures of good psychological functioning as well as purpose in life (e.g. Vittersø 2016).

#### 4.2.2 Capability approach

There is yet another concept used in subjective well-being research, known as the capability approach, which criticizes utilitarian happiness and instead brings individual-specific capabilities into focus. It emphasizes the importance of a person’s autonomy in achieving valued “*functionings*”. According to Sen (1985), “the standard of living is really a matter of functionings and capabilities and not a matter directly of opulence, commodities, or utilities”. To put it simply: it is not the things that people *have* that make them well, but what they are able to *do* and *achieve* with those things.

One of the chief strengths of Sen’s framework is that it is flexible and exhibits a considerable degree of internal pluralism, which allows researchers to develop and apply it in many different



ways (Alkire 2002: 8-11, 28-30). Sen refuses to endorse a fixed or definitive list of capabilities as objectively correct for practical and strategic reasons (Clark 2002: 54). Instead, he argues that the selection and weighting of capabilities depend on personal value judgements (which are partly influenced by the nature and purpose of the evaluative exercise). Sen also indicates that his approach can be used to assess individual advantage in a range of different spaces.

Criticism casts doubt on the usefulness of the approach for making interpersonal comparisons of well-being in the presence of potential disagreements about the valuation of capabilities, including the relative weights to be assigned to these capabilities (e.g. Beitz 1986). Sen was optimistic about achieving agreement about evaluations: he suggested that the intersections of different people’s rankings are typically quite large (Sen 1985: 53-56). He has also proposed a range of methods, including the intersection approach for extending incomplete orderings (Saith 2001). Finally, the informational requirements of Sen’s approach can be extremely high (see Alkire 2002: 181, Sen 1994). Evaluating social states typically depends on acquiring data on multiple functionings. In some cases, however, the relevant social indicators aren’t available. Moving from functioning to capability complicates the exercise drastically, as additional information is required on counterfactual choices (which cannot be observed) as well as actual choices (Clark 2005). Despite these operational difficulties, many credible innovative attempts have been made to measure well-being in the functioning and capability space (e.g. Clark 2002).

#### 4.2.3 The OECD Guidelines on Measuring Subjective Well-being

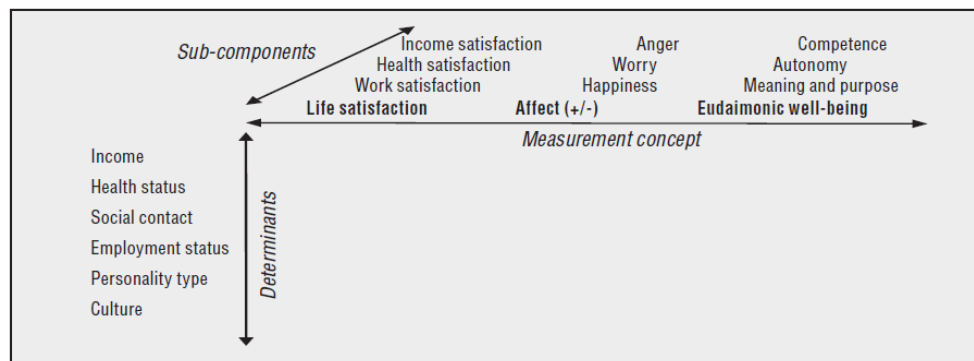
While subjective well-being has been examined extensively in the academic literature for decades, the lack of a consistent set of questions has hampered the international comparability of data for a long time. Bridging this gap was the main motivation for the OECD (2013a) to elaborate the *Guidelines on Measuring Subjective Well-being*. These Guidelines offer an integrated approach and propose a solution for statistical agencies to follow a standardized survey structure with standardized methodology. The role of the document is primarily to provide advice on best practice and “assist data producers in meeting the needs of users by bringing together what is currently known on how to produce high quality, comparable measures of subjective well-being” (ibid: 9).

Subjective well-being is taken to be “good mental states, including all of the various evaluations, positive and negative, that people make of their lives and the affective reactions of people to their experiences”. This broad definition encompasses the three elements of SWB mentioned above:

- Life satisfaction – a reflective assessment of a person’s life or some specific aspect of it.
- Affect – a person’s feelings or emotional states, typically measured with reference to a particular point in time.
- Eudaimonia – a sense of meaning and purpose in life, or good psychological functioning (ibid: 10).

The relationship between these concepts is visualized in Figure 2. Large-scale research based on the Gallup World Poll data (with 362,000 respondents in 34 OECD countries) pointed out that the correlation coefficients between these SWB variables vary between 0.229 and -0.385. The correlation is highest between the two measures of affect, and lowest between purpose and negative affect. The relatively low coefficients underpin the assumption that life satisfaction, affect, and eudaimonia are distinct concepts indeed.<sup>5</sup>

Figure 2. A simple model of subjective well-being (OECD 2013a: 33).



After an overview of the key concepts, the OECD Guidelines deal with methodological issues to support survey designers “in developing questions on subjective well-being and to identify strategies for minimising bias due to different measurement effects – including not just how questions are worded, but also how surveys are implemented” (OECD 2013a: 11). The OECD Guidelines include practical recommendations on how to report measures of subjective well-being best, as well as guidance for analysing this type of data. Annex A provides illustrative examples of different types of SWB questions, while Annex B offers six question modules, which focus on different aspects of SWB: A. “Core measures”, B. “Life evaluation”, C. “Affect”, D. “Eudaimonic well-being”, E. “Domain evaluation”, and F. “Experienced well-being”.<sup>6</sup>

### 4.3 Integrated, multidimensional well-being frameworks

The first multidimensional well-being concepts emerged in the 1970s with the works of Allardt (1976), Andrews and Withey (1976), and Campbell et al. (1976). The upsurge of initiatives around an integrated, multidimensional framework started in the 1990s, although it was

<sup>5</sup> Another empirical macro-level study showed a relatively high correlation (0.55-0.62) between average affect balance and life satisfaction (e.g. Diener et al. 2009), while Kahneman and Krueger (2006) reported a moderate correlation (0.38) at the individual level. Regarding the relationship between eudaimonia and other aspects of SWB, the correlation proved smaller (0.25-0.29) (Clark and Senik 2011).

<sup>6</sup> Module F. outlines approaches to collecting information on the positive and negative emotional states that people experienced while undertaking specific activities. This part can be useful for time-use surveys.

remarkably galvanized by the final report of the Commission on the Measurement of Economic Performance and Social Progress (Stiglitz et al. 2009). Nowadays, there is consensus that an appropriate well-being framework should be multidimensional, integrated, well-structured, and assessed via a mixed-methods approach (McGregor et al. 2015).

- Well-being is a “*multidimensional*” concept which cannot be captured adequately by considering a single score of happiness, satisfaction, or any other indicator. Simply comparing the national-level averages of “happiness”, for instance, or using them as input variables in regression analyses, might be an appealing option for researchers, but single-measure metrics cannot reflect the underlying complexity of well-being that would be essential for scientific analyses and policy purposes.
- The survey instruments are limited in assessing human well-being as far as they focus entirely either on its objective determinants or on subjective outcomes (King et al. 2014). “*Integrated*” refers to the view that a suitable framework should simultaneously reflect both the objective and subjective aspects of well-being. For example, simply measuring someone’s satisfaction with their monthly income without knowing at least the estimated amount of this income is insufficient, because the objective – material or immaterial – conditions provide the context within which the level of satisfaction can be understood. The opposite is also true: one’s absolute income does not necessarily correlate with one’s subjective perception of it. As Hagerty et al. (2001) have underlined, each well-being domain must have the potential to be measured by both objective and subjective indicators.
- Well-being frameworks should be *structured* consistently into “dimensions”, “domains” and “indicators”. Until recently, these terms were often used interchangeably in the literature. It is more than a semantic problem because it raises difficulties in navigating between well-being concepts, and it is a potential source of confusion that hinders the effective support of policy making. McGregor et al. (2015) advocated using a standardized nomenclature: “dimensions” are the higher categories that refer to the objective and subjective aspects of life (or, according to the OECD framework: the “material living conditions” and the broader notion of “quality of life”), while these dimensions should contain a set of domains, such as earning, housing, health, safety, etc. The context-specific indicators operationalize these domains, depending on the purpose for which the data are generated.
- Finally, studying well-being requires a *mixed-methods approach* using quantitative methods (surveys and secondary statistical data) as well as qualitative research techniques: individual cognitive and/or narrative interviews, structured focus groups, etc. These qualitative methods help researchers to identify locally relevant items that respondents consider important for a good life. (For instance, accessing clear drinking water might be a key aspect of well-being in a developing country, while this issue

might be not even mentioned in a first-world country). Thus, beside the measurement of people’s objective living circumstances and their subjective perceptions, the relative importance of these domains – health, family, salary, social connections, access to religious services, etc. – matters likewise.

#### 4.3.1 The OECD well-being framework

The OECD’s programme on Measuring Well-being and Progress is a direct descendant of the final report of the Commission on the Measurement of Economic Performance and Social Progress (Stiglitz et al. 2009). Since it was founded in 1961, the OECD has been aiming to help governments design better policies for better lives for their citizens. In 2011, the OECD launched the so-called *Better Life Initiative* to explore what drives human well-being in general, and what needs to be done to achieve greater progress for all in the 38 OECD countries. Among several projects within this initiative, the elaboration of the Better Life Index (see again Chapter 4.1) and the comprehensive biennial “How’s life” reports should be highlighted. Both of these outputs draw on the OECD’s general concept of human well-being.

- As a composite indicator, the *Better Life Index (BLI)* provides an easy-to-read overview of well-being patterns, based on input variables classified into eleven main topics: Housing (dwellings without basic facilities, housing expenditure, rooms per person), Income (net adjusted disposable household income, household net wealth), Job (labour market insecurity, employment rate, long-term unemployment rate, personal earnings), Community (quality of support network), Education (educational attainment, student skills, years in education), Environment (air pollution, water quality), Civic engagement (stakeholder engagement for developing regulations, voter turnout), Health (life expectancy, self-reported health), Safety (feeling safe walking alone at night, homicide rate), Work-life balance (employees working very long hours, time devoted to leisure and personal care), and Life satisfaction. The input variables come from official sources such as the OECD databases, United Nations Statistics, national statistical offices, and the Gallup World Poll, which regularly conducts public opinion polls in more than 140 countries around the world. In general, the BLI aims to involve citizens in the debate on what makes for a better life and “to empower them to become more informed and engaged in the policy-making process that shapes all our lives”. It is an interactive tool that allows people to see how countries perform according to the importance they attach to each topic. However, the outputs cannot be used for temporal analysis. They don’t allow comparisons of disparities between various social groups, and the index cannot be compared over time ([BLI website](#)).
- The second way of responding to the demand for a better understanding of people’s well-being involves a more nuanced approach. The *How’s Life Reports* – published in 2011, 2013, 2015, 2017, and 2020 – include datasets and more detailed analyses of well-

being inequalities in the OECD countries according to the eleven different domains that were mentioned previously. Beside the national status quo analyses, special chapters are dedicated to certain topics. For instance, the far-reaching consequences of the global financial crisis are examined in the reports of the early 2010s, while the impacts of the Covid-19 pandemic are emphasized in the 2020 report. Migrants' well-being is a major topic in the 2017 How's Life Report, shortly after the 2015-16 European "refugee crisis".

The general *OECD framework of well-being* fulfils all criteria listed in the previous chapter. In this concept, well-being is measured in terms of outcomes achieved in two broad dimensions: "Material living conditions" and "Quality of life" (Figure 3).<sup>7</sup> Moreover, it also reflects the sustainability of well-being, i.e., the capacity of societies to achieve well-being outcomes that can last over time. The measurement of sustainability "requires looking at the evolution over time of the different stocks of capital (economic, environmental, human and social) that sustain the various dimensions of well-being, and in particular at how decisions taken today affect these stocks" (OECD 2011: 20).

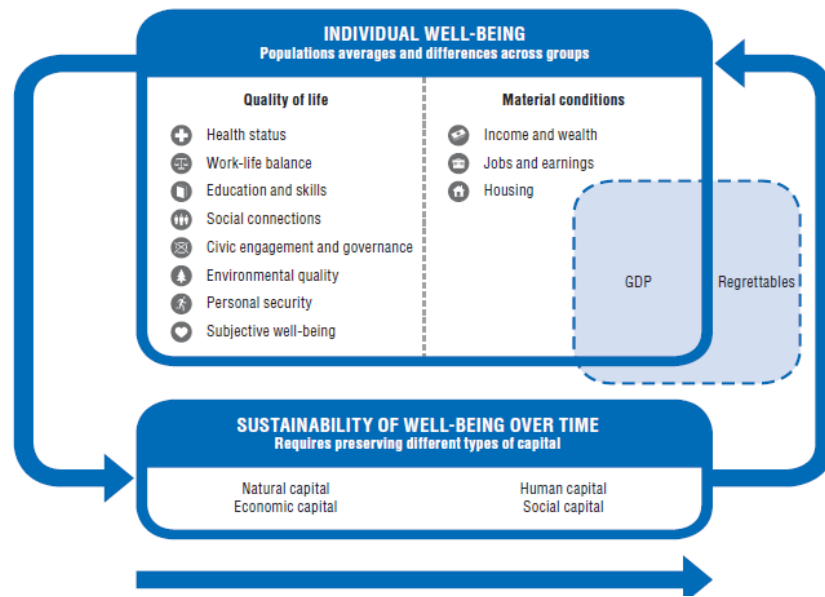
The "Material living conditions" and "Quality of life" dimensions contain the most important – to some extent universal – objective components of well-being and, somewhat confusingly, people's evaluations and feelings about their own lives, too. Although the second pillar contains several human development indicators, the approach to subjective well-being remained at a relatively broad-brushed level. While most of the selected indicators came from official, internationally comparable data (e.g. employment rate, voter turnout, number of rooms per person in a dwelling), the report used two SWB variables from the non-official World Gallup Poll survey: one question about life-satisfaction and one about affect balance. This solution reflects both the purpose of the framework and the level at which it operates. The OECD framework<sup>8</sup> was principally designed to measure aggregated well-being scores at the level of countries and global macro-regions by using existing data from national statistical systems and international agencies (McGregor et al. 2015).

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<sup>7</sup> In 2020, the OECD Well-being Framework was updated, following a consultation with member countries and in line with best international practice on measuring well-being. This process involved the reshaping of certain dimensions (e.g., "Jobs" is now "Work and Job Quality" to reflect the importance of a good working environment), and the inclusion of new themes and indicators (e.g. mental health, unpaid work).

<sup>8</sup> To avoid misunderstanding: this is not identical with the OECD Guidelines on Measuring Subjective Well-Being (2013) that were mentioned above. While the interest in the How's Life framework lay with the objective determinants of well-being on country level and the subjective well-being assessments that are 'global' in character (e.g., life satisfaction as a whole), people's own evaluations and emotions are the subject of interest in the OECD Guidelines on Measuring Subjective Well-being (2013).

Figure 3. The OECD well-being framework (OECD 2013b)



#### 4.3.2 The WeD framework

The purpose that our project is dedicated to requires a better understanding of the drivers of well-being at the individual level, including details from domain-level assessments of satisfaction. With broadly similar foundations but designed rather for use at a micro level, the ‘WeD framework’ takes account of the dynamic interplay of three main well-being dimensions. The concept was developed by the ESRC ‘Well-being in Developing Countries’ research group at the University of Bath (Gough and McGregor 2007).

In the WeD framework *material* well-being encompasses the objective circumstances of life, including resources such as income or employment. However, since people’s goals and actions are always shaped by the social contexts in which they are embedded, well-being has a *relational* dimension too. This dimension refers to the social relationships that people must be able to enter into in order to meet human needs. It “links the framework from the individual to the social” (Britton and Coulthard 2013: 32) by encapsulating essential but less tangible aspects of well-being such as love, friendships, family ties, relationships with the community and the wider society, or the construction of identity, which is a situational and relational process (Tajfel and Turner 1986). The third – *subjective* – dimension takes account of “what it is that people themselves regard as important for their quality of life and their assessment of their level of subjective satisfaction in their achievement” (McGregor and Pouw 2017: 1135).

Whereas the OECD How’s Life framework and the international surveys, such as EU-SILC, European Quality of Life Survey or European Social Survey, tend to focus on the individual factors of subjective well-being, and include very few questions about social relationships, the WeD approach places special emphasis on locally relevant social aspects. It is crucial for MIGWELL because migration decisions and post-move SWB evaluations are socially



embedded. (Concerning the role of social relationships, see Chapter 5.2.2. For the conceptual framework of the project, see Chapter 6.2).

## 5. Well-being and migration

### 5.1 Relationship between the objective and subjective dimensions of well-being

The relationship between the material and the subjective aspects of well-being is a relatively well-documented segment of social sciences. This chapter will address this large body of literature only briefly, summarizing the most influential theories on the link between individual financial situation and happiness and/or life satisfaction.

#### 5.1.1 Theories on the nexus of income and subjective well-being

In the early studies of Easterlin (1974) and Scitovsky (1976), income and welfare played the main role as a source of happiness. The *absolute income hypothesis* states that people in a better economic situation tend to report higher life satisfaction than those within the same society who are less well-off (Diener 1984: 553). However, the positive association between income and happiness tends to disappear over the long run. Thus, increasing welfare is often coupled with stagnating SWB. The so-called *Easterlin paradox* is an extensively discussed phenomenon in the literature (see e.g. Easterlin 1974, 1995, Clark et al. 2008, Stevenson and Wolfers 2006). The assumption is that once a person's basic material needs are satisfied, the person's sense of happiness and/or life satisfaction is affected by other, predominantly immaterial aspects of well-being (Caporale et al. 2009).

According to the *diminishing marginal utility theory*, increasing income is less important for the subjective well-being of wealthy people (Frey and Stutzer 2002). However, the selection of the appropriate indicator is especially crucial here. Peiró (2006) found a stronger link between individual financial situation and life satisfaction than between the former and happiness.

The *relative income hypothesis* (published in its early form by Duesenberry 1949) suggests that the utility of one's own income is evaluated through the prism of a chosen reference group who play a benchmark role for comparisons. Neighbours, friends, colleagues, particular social groups, the abstract category "people like you" – in terms of educational level, employment status, age, gender etc. – or even all other citizens of the same country may compose a reference group (Clark and Oswald 1996, Clark and Senik 2010, Easterlin 1995). How individuals feel about their well-being depends on the distance between their own individual income level and the reference value. This hypothesis emphasizes the negative and asymmetric impact of the reference income on individual utility; upward comparisons – from below-the-reference income – seem to have a stronger impact on SWB than downward comparisons (Boyce et al. 2010, Dummludag 2014). Stutzer (2004) pointed out that a previously better financial situation may also reduce utility. (For a detailed review of the role of comparisons, see e.g. Clark et al. 2008,

Dumludag 2014, and Chapter 5.1.2 below).

The negative impact portrayed by the relative income hypothesis is in sharp contrast with the *tunnel effect* (Hirschman and Rothschild 1973), which occurs when the success of a reference group creates a base for optimistic expectations and contributes to a positive SWB change. (The authors used the metaphor of a traffic jam in a tunnel. When the traffic in a lane starts to move, drivers in the others lane takes this signal as an indication of “light at the end of the tunnel”). Thus, as Caporale et al. (2009) pointed out, people may interpret any positive signals in adverse and uncertain situations to predict an improvement in their own situation to occur sooner or later. The presence of the tunnel effect has been confirmed by, among others, Caporale et al. (2009) and Senik (2008).

The *income rank hypothesis* states that people’s self-rated life satisfaction is primarily influenced by the relative ranked position of their income within their social comparison group. “Income and utility are not directly linked: Increasing an individual’s income will increase his or her utility only if ranked position also increases and will necessarily reduce the utility of others who will lose rank” (Boyce et al. 2010: 471). In other words, the ranked position of an individual’s income, rather than the income per se or its relation to a reference income, is beneficial for well-being (Quispe-Torreblanca et al. 2021). Several studies support the *income rank hypothesis*, including Clark and Senik (2014), Quispe-Torreblanca et al. (2021) and Wood et al. (2012).

It must be noted that causal effects are still under debate in the scientific literature, and that the hypotheses mentioned above have rarely been tested in the context of migration until now.

### **5.1.2 The role of reference groups and social comparisons**

Reference groups seem to play a key role in evaluating subjective well-being. Since the term itself has been coined by Herbert Hyman (1942), it has provided useful insight into social behaviour and has been used in the explanation of various behaviour patterns. A reference group is a group against which an individual evaluates his or her situation or conduct. The membership group and reference group can be the same, but they can also be different; they are not mutually exclusive. The term reference group has been used in two ways, to mean either a group of which the individual aspires to membership or a group whose values, norms, and attitudes serve as points of reference for the individual. In either case, the crucial feature is that the individual adapts his/her attitudes and behaviour to model those of the members of the reference group.

The current understanding of the reference group assumes that reference groups change over the course of an individual’s life and that we select from a specific set of reference groups for comparison at a given time and in a given situation. A previously positive reference group may become negative over time (Newcomb 1943). For some issues, a particular reference group will provide the basis for comparison, for other issues, the reference group will be different. For example, our political attitudes are measured against a different group than our holiday habits.



The directions of comparison stems from various personality needs and motivations and have different consequences regarding the psychological balance and SWB of a person. Wills (1981) introduced the concept of downward comparison. Downward social comparison is a defensive tendency that is used as a means of self-evaluation. When people look at another individual or group that they consider to be worse off than themselves in order to feel better about themselves or their personal situation, they are making a downward social comparison. Research has suggested that social comparisons with others who are better off or superior, or upward comparisons, can lower self-esteem, whereas downward comparisons can elevate self-esteem. Downward comparison theory emphasizes the positive effects of comparisons in increasing one's subjective well-being (ibid). Although social comparison research has suggested that upward comparisons can lower self-regard, Collins (1995) indicates that this is not always the case. Individuals make upward comparisons, whether consciously or subconsciously, when they compare themselves with an individual or comparison group that they perceive as superior or better than themselves in order to improve their views of self or to create a more positive perception of their personal reality. Upward social comparisons are made to self-evaluate and self-improve in the hope that self-enhancement will also follow. In an upward social comparison, people want to believe themselves to be part of the elite or superior group, and make comparisons highlighting the similarities between themselves and the comparison group, unlike a downward social comparison, where similarities between individuals or groups are disassociated (Suls et al. 2002). Regarding the circumstances that determine the direction of social comparison, Aspinwall and Taylor (1993) emphasized the dynamic relationship between affect/mood, self-esteem, and threat as key moderators of choosing upward or downward comparisons.

## 5.2 The subjective well-being – migration nexus

### 5.2.1 Empirical studies and generalized conclusions

Although there is still no universal definition of happiness or life satisfaction, it is firmly believed that individuals usually act to improve their well-being and that this is the final goal of their choices and actions (Selezneva 2011: 140). From this perspective, voluntary migration can be considered a tool to reach the desired outcome of increasing well-being. However, whereas there is a vast amount of literature examining the nexus of material life conditions and migration (Chapter 3) as well as the material and subjective aspects of well-being separately (Chapter 5.1), the third vertex of this theoretical triangle, the *SWB-migration nexus*, has just started gaining attention in the last years (e.g., IOM 2013, OECD 2017, Hendriks and Bartram 2018).

Since very few international surveys are explicitly designed towards measuring migrants' well-being outcomes, little is yet known about the consequences of *migration for subjective well-*

*being* and particularly about the effects of *SWB on migration intentions and/or decisions*.<sup>9</sup> Empirical results suggest that migrants experience lower levels of life satisfaction than natives do in general (Baltatescu 2007, Bobowik 2011, OECD 2017), that second-generation immigrants seem to be unhappier than their first-generation counterparts (Safi 2010, Senik 2011), and that emigrants are usually less satisfied with their lives than stayers (Bartram 2011, Knight and Gunatilaka 2010). These conclusions and explanations however are far from consistent, and other studies even show opposite results (e.g. Lengyel 2012, Erlinghagen 2012, Ivlevs 2015).

The *divergence of findings* not only arises from obviously different historical and geographic contexts but also from the lack of a standardized, coherent theoretical framework. The investigations have predominantly used cross-sectional data to compare immigrants and natives in host countries (Baltatescu 2007, Bartram 2010, Safi 2010, Göncz et al. 2012) or emigrants from and stayers in the sending countries (Bartram 2013, Erlinghagen 2012). Although both approaches provide useful information, none of them can adequately demonstrate a causal impact per se. On the one hand, simply comparing emigrants with similar people who remained in their country of origin can be misleading, since well-being gains may reflect unobserved differences in ability, risk tolerance, or motivation (McKenzie et al. 2010). On the other hand, neglecting pre-migration experiences obscures reverse causality, i.e., it does not rule out selectivity biases, whereby dissatisfied people may be more likely to migrate (Stillman et al. 2015). In the absence of longitudinal data, there are two alternative options<sup>10</sup>: to create a two-period synthetic panel with statistical matching (e.g., Nikolova and Graham 2015) or to ask respondents to estimate their general life satisfaction retrospectively, prior to and after migration (e.g., Amit and Riss 2014).

In spite of these methodological concerns and somewhat divergent conclusions, a growing number of academic papers has demonstrated that the separation of material and immaterial determinants and their subjective perceptions does make sense because they can influence migration decisions and the post-move evaluations in different ways (e.g. Graham and Markowitz 2011). Two *directions of SWB alterations* are generally taking shape in the literature, namely increased versus decreased post-move life satisfaction (De Jong et al. 2002). Even though migrants' absolute incomes may rise, their original expectations can be met with disappointment and their SWB may be reduced. Reasons for this phenomenon can include the physical distance from their safe social and family networks, the linguistic and cultural distance

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<sup>9</sup> Previous studies diverge in their estimation of the degree to which migration intentions can be considered a good indicator of the actual act of migration. Nevertheless, if migration is conceived as a selection process, then intentions and the actual act can be considered different phases of the whole process (Gödri and Feleky 2013). There are not many longitudinal studies that can measure whether and to what extent intentions turn into the real act. According to a study done in the Netherlands between 2005 and 2007/2010, 24% of the expressed intentions had turned into actual migration by 2007 and 34% by 2010 (Van Dalen and Henkens 2013), and migration intention was found to be the main predictor of the actual act. A similar study in Hungary found that 20% of men and 12% of women had turned their migration intentions in 2003 into the act by 2007 (Hárs 2008).

<sup>10</sup> For a unique exception see Stillman et al. 2015.

from the host society, or the unexpectedly emerging frustration that stems from finding themselves in a lower position compared to members of the native population (Bartram 2010:2, Stillman et al. 2015:86).<sup>11</sup>

While the *set-point theory* claims that individuals have their own set points of SWB and revert to that set point once the psychological impact of major life events has dissipated, substantial and permanent *upward or downward changes* in life satisfaction are also observable in the context of migration (Headey 2008). As Nowok et al. (2011) have summarized, migrants often experience frustration and dissatisfaction before their departure, whereas they feel happiness and high expectations during the process of migration but reduced SWB in the post-move phase. It also means that not only people’s own past income and the reference group’s living standard but also their expectations for the future is an important element of SWB-related comparisons.

The dynamics of these changes causes the *temporal fluidity of well-being*, which presents a remarkable methodological challenge for empirical studies (McGregor 2007). This phenomenon is consistent with the relative income hypothesis mentioned in the previous chapter, and has “similar DNA” with Brickman and Campbell’s (1971) “hedonic treadmill” hypothesis from the psychology literature as well as “preference drift” from the economics literature (Van Praag 1971). As Headey et al. (2008: 68) pointed out, people tend to “change their preferences in response to what others have and want”. Since people’s aspirations and social relationships are permanently changing, what really matters to them in the assessment of their quality of life may also change as a consequence of adaptation to the new external circumstances (Easterlin 2005, Nussbaum 2001, Quizilbash 2006). In the context of migration, this process entails the change of the reference groups too – e.g., new neighbours, new colleagues, and a new host society, very often with higher average living standards – which play the role of a benchmark for comparisons. Thus, when immigrants change their reference group (see again Chapter 5.1.2), the comparisons they make may become less favourable, so that they may be more miserable than before, regardless of the fact that their objective situation might have improved significantly.

The theoretical background of the mechanisms mentioned in this chapter, including differences between the short-term and long-term dimensions of evaluation, is still not well grounded. Qualitative methods can provide important insight into the dynamics of the adaptive preferences, the changing reference groups, the relational dimension of well-being, etc.

### 5.2.2 Social connectedness and subjective well-being

The nexus between subjective well-being and the concepts of social capital (Bourdieu 1986, Coleman 1990, Putnam 1995, Tzanakis 2013 etc.) and social cohesion (e.g. Chan et al. 2006,

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<sup>11</sup> Cultural and linguistic differences create barriers implying “costs that potential migrants likely consider in deciding whether to migrate and where to go” (Adserà 2015) but the existence of large immigrant communities may encourage further moves and decrease migration costs (Pedersen et al. 2008).

Dragolov et al. 2016, Schiefer and Noll 2017) has been gaining increasing attention in the literature. These are closely interrelated concepts, but aggregated indicators of cohesion are more appropriate for macro analyses, whereas data on the individual level should be used to analyse the relationship between social capital and subjective well-being (Klein 2013). Nevertheless, while studies have found positive links between social connectedness and life satisfaction in general (e.g. Anheier et al. 2004, Bjørnskov 2003, Dragolov et al. 2018), relatively few have considered how social networks affect SWB within immigrant communities (e.g. Xu and Palmer 2011, Tegegne and Glanville 2018).

Familial relations definitely belong to the key factors that potentially shape migrants' subjective well-being and its relationship with their decisions to move or stay. Preliminary qualitative studies have already revealed that not only the way migrants narrate their life history is shaped by gender-specific differences, but their perceptions of subjective well-being is also often “gendered”. Central-European migrants tend to frame their own migration in terms of well-being, and the narrative of *familial well-being* is quite common, particularly in the case of female respondents (Kovács and Melegh 2001, Melegh and Kovács 2008).

The success of *integration* might also be an important factor for migrants' SWB changes. In general, integration refers to the process by which migrants become accepted into society, both as individuals and as groups. It is a two-way process of adaptation – and a form of acculturation<sup>12</sup> – that requires efforts both from migrants and from the host society. Ultimately it is useless for a person to be ready to integrate if the host environment does not support him or her in this process. The changes that immigrants undergo involves at least six areas: language, cognitive styles, personality, identity,<sup>13</sup> attitudes, and acculturative stress. The cause of problematic outcomes often stems from the different acculturation expectations of the host society and the acculturation orientation adopted by the immigrants (Bourish et al. 1997, Van Oudenhoven et al. 1998). Investigating the social connections between migrants and members of the host population (and the subjective perceptions of these relationships) is essential for a better understanding of the SWB–migration nexus.

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<sup>12</sup> Depending on the degree to which migrants maintain their cultural heritage and/or their relation with the host society, Berry (1997) identified four main acculturation strategies: assimilation (positive relations with the host society are dominantly important), separation (maintaining one's own culture is of sole importance), marginalization (none of these outcomes is important) and integration (it is important both to maintain cultural identity and to have positive relations with the host society).

<sup>13</sup> Acculturation is connected with the issue of identity change (Dovidio et al. 2005). The model of de-categorization describes the process that takes place when earlier social identity categories lose their importance and individuals find other more personalized categories to identify with. Ethnic or national identity categories in the EU can for instance be replaced by more individualistic or idiosyncratic categories such as professional performance, lifestyle, or ideology (Brewer and Miller, 1984; Wilder, 1981).

### 5.2.3 Migratory aspirations, capabilities and subjective well-being

In the aspirations-capabilities framework (Chapter 3.7) migration and SWB are connected on two levels. On the one hand, De Haas' concept is heavily inspired by Amartya Sen's (1999) *capabilities* approach of human well-being (Chapter 4.2.2). De Haas emphasized that people could derive well-being from having potential access to mobility freedom, irrespective of whether they applied these freedoms. "The central idea is that the very awareness of having the freedom to move and migrate can add to people's life satisfaction, in the same way that freedom of speech and religion, the right to organise protest marches or to run for office can contribute to people's well-being, irrespective of whether or not they eventually use those freedoms. Conversely, if people do not enjoy such freedom, they are likely to experience this as a form of well-being-decreasing deprivation" (De Haas 2021: 18). Regarding migratory *aspirations*, De Haas expanded the notion of migratory agency into the subjective realm. Migration aspirations reflect people's general life preferences and their subjective perceptions of the quality of life in the current place of living as well as their perceptions about opportunities elsewhere. This line of thought is consistent with many other well-being approaches, summarized in Chapter 4.

### 5.3 Subjective well-being and migration plans under conditions of extreme uncertainties

Climate change, pandemic, war, energy shortage, food crisis: people around the world are today facing serious physical and existential threats. In the wake of global "multicrisis", the sense of uncertainty may remarkably influence both subjective well-being and migration aspirations. However, in contrast to risk, which includes probabilistic chances, the outcomes of uncertainty are difficult to estimate (Knight 2006). From a conceptual point of view, it is advisable to distinguish between micro and macro sources of uncertainty. Within the latter category one can distinguish materialist and post-materialist problems, although the boundaries are blurred (Coleman 1990, Inglehart 1997, Lengyel and Vicsek 2004) (Table 3). In this context, insecurity can be interpreted as an extreme and permanent form of uncertainty.<sup>14</sup> The Covid-19 pandemic is one of the main current macro sources of worry and uncertainty.

Table 3. A typology of some frequently mentioned sources of worry and insecurity.

Source: Lengyel and Vicsek (2004)

	Micro	Macro
Materialist	Own financial conditions Health Family life ...	Material conditions of the country Crime War Pandemic Energy crisis ...
Post-materialist		Global environmental problems Development of science and technology ...

<sup>14</sup> For more details see e.g. Boehnke et al. 1998, Occhianero 1997, Schwartz and Melech 2000.

Life has changed dramatically in most countries as a result of Covid-19. The pandemic's worst effect has been the two million deaths in 2020; it represents a rise of nearly 4% in the annual number of deaths worldwide. There has been greater economic insecurity, anxiety, and disruption of every aspect of life (Helliwell et al. 2021). The implementation of restrictive measures to control the pandemic – including nationwide closures of schools and other public institutions – has challenged the physical and mental health of many people. Recent case studies from all over the world provide evidence that the pandemic negatively affected people's psychological well-being (e.g. Gray et al. 2020, Otu et al. 2020, Patrick et al. 2020, Gassman-Pines et al. 2020). As O'Connor et al. (2020) underlined, based on a survey from the United Kingdom, the adult population was particularly strongly affected in the initial phase of the pandemic. While the levels of loneliness and the symptoms of depression did not change significantly during the Covid-19 waves, suicidal ideation increased over time. Subgroup analyses showed that women, young people (18–29 years), those from socially disadvantaged backgrounds and those with pre-existing mental health problems had worse mental health outcomes during the pandemic across most factors.

Greyling et al.'s (2021) results from Australia, New Zealand and South Africa showed that lockdowns were associated with a decline in happiness, regardless of the characteristics of the country or the type and duration of lockdown regulations. Lades et al. (2020) underlined that during lockdowns, the time spent outdoors (going for walks, gardening, pursuing hobbies etc.) was associated with markedly raised positive effects and reduced negative emotions. In Germany, the crisis lowered the life satisfaction of individuals, especially for parents with young children, for women, and for persons with lower secondary schooling qualifications. The largest decreases were seen for families with toddlers and preschoolers, and the life satisfaction rates increased with the age of the children (Huebener et al. 2021).

Based on the annual data from the Gallup World Poll, global life evaluation and happiness rankings proved stable; the same countries remained on the top of the list (Finland, Iceland, Denmark, and Switzerland). Using data from 95 countries, the World Happiness Report 2021 (Helliwell et al. 2021: 13-56)<sup>15</sup> concluded that the number of people who said they were worried or sad grew significantly worldwide. Similarly, the reported frequency of stress showed a remarkable increase in 2020. However, while “the pandemic's toll on negative emotions is clear”, the life evaluation scores proved almost unchanged from 2017-2019 to 2020 on a global scale; in 26 countries they have increased, in 20 countries they have decreased significantly (ibid: 24). Moreover, there was an increase in the share of people who felt well-rested and who had done something interesting on the day prior to their interviews. There was a significant drop in the reported frequency of health problems too. The measurements of Petrovic et al.

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<sup>15</sup> In 2020, the Gallup World Poll team could not conduct face-to-face interviews. The shift from computer-assisted personal interviews (CAPI) to computer-assisted telephone interviews (CATI) may have changed the pool of respondents in some countries. However, the “data suggest that the effects of the method change are unlikely to have been large enough for the world as a whole to mask any large drops” (Helliwell 2021:24).



(2021) yielded surprising results with increasing scores of happiness in the Czech Republic, compared to previous years.

2020 is expected to be a historical nadir for international migration, since migration flows in the OECD area are estimated to have fallen by 46 per cent in the first semester of 2020. In general, migrants seem to be disproportionately exposed to the socio-economic effects of the crisis; in all countries for which data are available, immigrants' unemployment has increased, compared to their native-born peers (OECD 2020). Since Hungarian workers in Austria are concentrated in sectors that are more affected by the economic downturn (e.g., the hospitality industry, 24-hour home nursing) similar processes might be observable. The way in which the economic recession, as a consequence of the lockdowns and other political measures to control the pandemic, influences the career patterns, the migration decisions, and the well-being of migrants will be also studied in the MIGWELL project through a battery of targeted survey questions and interviews. Finally, we plan to ask the interviewees how uncertain they feel about the future and what they consider to be the main sources of uncertainty in the shadows of the pandemic as well as the economic and energy crisis caused by the Ukrainian war.

## 6. The conceptual framework of MIGWELL

### 6.1 MIGWELL and migration theories

The migration theories that were summarized in Chapter 3 are not necessarily contradictory. The causal processes relevant to international migration might operate on multiple levels simultaneously. It is entirely possible that individuals engage in cost-benefit calculations to maximize income, that households act to minimize risks, and that the socioeconomic context within which these decisions are made is determined by structural forces operating at national and international levels (Papademetriou and Martin, 1991). As Castles et al. (2014) have stressed, each of these theories has its place, and a full understanding of migration requires contributions from many of them.

Thus, instead of building on one specific migration theory only, MIGWELL takes elements from different concepts. For the purpose of the project, *micro- and meso-level approaches* are especially relevant. Although the concept of well-being has long not been linked explicitly to any migration theories, the new economics and sociology of migration (NELM) have already highlighted the importance of perceived deprivation and some other subjective aspects of migration decision-making. According to NELM, migration might be an option for households towards obtaining a sustainable livelihood by avoiding deterioration of household poverty and improving capabilities and resilience (De Haan et al. 2002). The push-and-pull concept is widely considered relatively outdated. Yet, push-and-pull factors might serve as useful tools during the MIGWELL interviews and focus groups. These notions might offer a meaningful, easy-to-understand way for people to evaluate and interpret their individual migration decisions in the context of subjective well-being. Since the existence of migrant networks can play a

significant role in the decision-making process as well as in post-move subjective well-being changes, people’s connections with the expatriate community will also be surveyed. This endeavour requires the consideration of network theory as a meso-level approach.

Migration cycles provide a key *macro-level* concept to put the Hungary-Austria migration nexus into a wider context. Although European countries do not necessarily pass through these phases in this exact order or at the same pace, and although the model of migration cycles does not reflect explicitly on the liquid forms of migration, the concept helps us to grasp the dynamics of international migration transition in Europe. While Austria, for instance, already represents a typical immigration country where the socio-demographic challenges of the welfare state – such as an ageing population, leading to increased pressure on the healthcare and elderly care system (Katona and Melegh 2020) – induce an increasing demand for immigrant workers, Hungary is in a transition phase where both directions of migration flow are similarly important, although its migration balance is negative in relation to Austria and other Western countries. In relation to that, the dual labour market theory might also be relevant to MIGWELL. People’s labour-market positioning before and after migration, and their relationship with their income and subjective well-being is an important aspect of this project. Finally, the project will reflect on the aspirations-capabilities approach too, by investigating migration inclinations and intentions of Hungarians living in Hungary and of potential returnees from Austria.

## 6.2 MIGWELL and the concept of well-being

Since the secondary data sources of the MIGWELL project (EU-SILC, Hungarian microcensus) principally follow the OECD Guidelines, all of their SWB variables are necessary for a comparative analysis. As the recommended question modules suggest, “overall life evaluations should be assessed first, followed by eudaimonic well-being, with more specific questions about recent affective experiences asked next and domain-specific questions last” (OECD 2013a: 161-171) (Table 2).

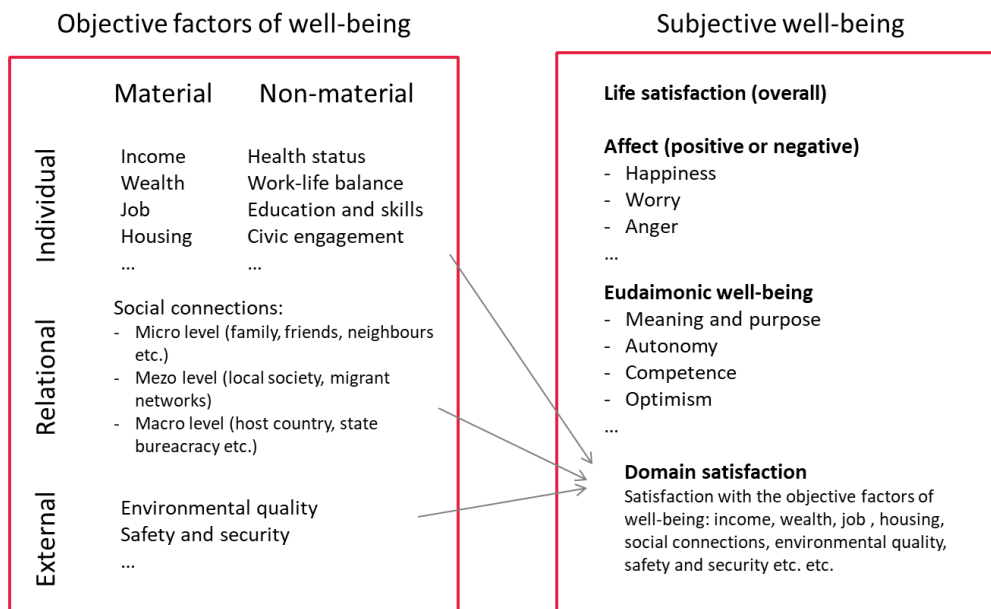
Table 2. A simple model of SWB measurement and related question examples, based on the OECD Guidelines (2013a: 33, 253-262). The list of sub-components and questions is illustrative rather than exhaustive.

Measurement concept	Life satisfaction	Affect	Eudaimonic well-being
Sub-components	Overall life satisfaction, satisfaction with income, satisfaction with accommodation, satisfaction with health status, etc.	Happiness, anger, worry, etc.	Meaning and purpose, autonomy, competence
Recommended question modules	1. Life satisfaction      4. Domain satisfaction	2. Affect	3. Eudaimonia
Question examples	Overall, how satisfied are you with life as a whole these days? (0-10)  How satisfied are you with your income / accommodation / working conditions / health / personal relationships etc.?	Overall, how often did you feel happy / calm / worried / tired / angry / depressed / sad / stressed etc. these days?	To what extent do you feel: the things you do in your life are worthwhile / you are free to decide how to live your life / that you are optimistic about your future? etc.



However, subjective well-being cannot be sufficiently measured on its own, without considering the resources that people have and the relationships that influence their actions (McGregor 2007). Therefore, subjective reflection on life satisfaction, affect, and eudaimonia will be our focal point – again, based on pre-defined EU-SILC variables that are essential for a comparative analysis – while additional sets of questions on the material and relational dimensions are expected to provide deeper insight into the dynamics of the migration-SWB nexus. (Previous examples of methodological adaptations can be found, e.g., in Britton and Coulthard 2013, Te Lintelo et al. 2018.) Therefore, MIGWELL applies a hybrid approach in conceiving well-being, inspired by both the OECD and the WeD concepts (Figure 4).

Figure 4. The relationship between the objective and subjective dimensions of well-being on a personal level according to MIGWELL (Source: own design)



In practice, our goal will be to identify some relevant, objective, observable factors of well-being (household income, employment status, housing quality, etc.) and the social connections that people perceive as the most important in terms of the degree of their influence on migration behaviour and SWB. Respondents should identify, evaluate, and rank their relationships by importance. On the one hand, the strongest influence on migration decisions might be associated with macro-level (e.g., dissatisfaction with salary or state bureaucracy), meso-level (e.g., tensions within the community, dissatisfaction with the quality of local public services)<sup>16</sup> or even micro-level relationships such as familial relations.

<sup>16</sup> Migali and Scipioni (2019) pointed out that migration potential tends to increase significantly along with people's decreasing satisfaction with local public services, e.g., healthcare or educational institutions, and that the influence of this relationship can be stronger than that of income.

On the other hand, people’s connections with the expatriate community will also be surveyed because migrant networks can play a significant role in reducing migration costs and stimulating migration. Furthermore, since people’s choices and actions are shaped by the social contexts in which they are embedded, this is where the role of the “reference group” – a prism through which the own income and other well-being factors might be evaluated – will also be investigated. While the success of a reference group might create a basis for optimistic expectations, the change of the host society as a major reference group – i.e., higher living standards in Austria – might cause frustration and decreased SWB per se (about the theoretical background see Chapter 5). Since the narrative of familial well-being is traditionally strong in the case of Central-European migrants (Melegh and Kovács 2008), the project will also pay attention to surveying family relationships.

### 6.3 Research questions and methods

The major *shortcomings* of contemporary well-being studies in the context of migration are as follows:

- With few exceptions, the international surveys do not include migrant-specific background variables.
- Most conclusions are drawn from developed countries’ data, while the research for transition countries – and particularly developing countries – is still rather sparse.
- The causal relationship between migration and subjective well-being has only been receiving attention for the past couple of years and has thus remained an under-theorized topic.

This new literature suffers from further pitfalls:

- The research predominantly focuses on the effects of migration on SWB, yet we know little about the effects of SWB on migration intentions and decisions.
- It uses mostly cross-sectional data concentrating on the host countries and neglecting the dynamic aspect, i.e., immigrants’ SWB prior to their migration.
- It has not yet empirically tested the accumulated hypotheses regarding the mechanisms of SWB changes in the context of migration.
- It mostly applies the narrow happiness approach and pays less attention to other measurement concepts.
- It does not regularly investigate the impact of uncertainty and health on migration potential and SWB, which might play an important role in the era of the Covid-19 pandemic.

The proposed project aims at addressing these neglected issues. Its *innovative approach* is not simply the strong linkage of subjective well-being and migration, but rather the attempt to understand their two-way relationship within one research framework. The aim of this project,

in its simplest and shortest form, is to answer the following research questions, grouped around three analytical domains.

1. *Austria-Hungary SWB gap*. Which objective indicators are responsible for the vertical and horizontal inequalities and the country-level differences in subjective well-being? To what extent are people satisfied with their lives as a whole and with different life domains (such as financial situation or accommodation) in Hungary and in Austria? Does the SWB gap satisfactorily explain the reasons and drivers behind the international migration flows? How has the Covid-19 pandemic and its economic and labour-market consequences affected migration and people's SWB patterns?
2. *SWB → migration nexus*. What role does subjective well-being play concerning the migration potential of Hungarians still living in Hungary? How do people construct well-being; which areas of life are important for them and what trade-offs are they willing to make in order to improve their overall well-being? Do the mean values of SWB variables display different patterns for potential stayers and potential migrants?<sup>17</sup> If so, how does it influence their decision either to stay or to migrate? Are potential migrants those who rank very low on the SWB scale, or is just the opposite true, namely that those who are better off in terms of social and material resources are also those readier to face challenges and move ahead? How do Hungarian returnees narrate their decisions to leave Austria?
3. *Migration → SWB nexus*. What differences in the general profiles of subjective well-being can be detected between Hungarians who still live in Hungary and those who have moved to Austria? What differences can be found when the same respondents are asked to provide a retrospective evaluation regarding (a) their pre-move SWB, (b) their SWB after settling in Austria, and (c) their SWB at the time the survey was conducted? Are there any differences between short- and long-term evaluations? Has the perception of their quality of life improved linearly with their material gains, or has it failed to reach the expected level due to, e.g., the weakening of social relationships, over-qualification (negative effect on mental health status), or even the 'upward-adaptation' (temporal fluidity of well-being)? How has migration affected their social relationships and identities and how have these changes contributed to the reconstruction of their well-being (changing priorities and satisfaction)?

The project will apply a *mixed-methods approach* including secondary analyses (literature review, migration data, the EU-SILC in Austria and Hungary, the microcensus in Hungary) and the combination of quantitative and qualitative methods: focus groups, interviews, surveys, and round-table discussions conducted in both countries. The deliverables of WP2 and WP3 will contain detailed information about the diverse methodological toolkit of MIGWELL.

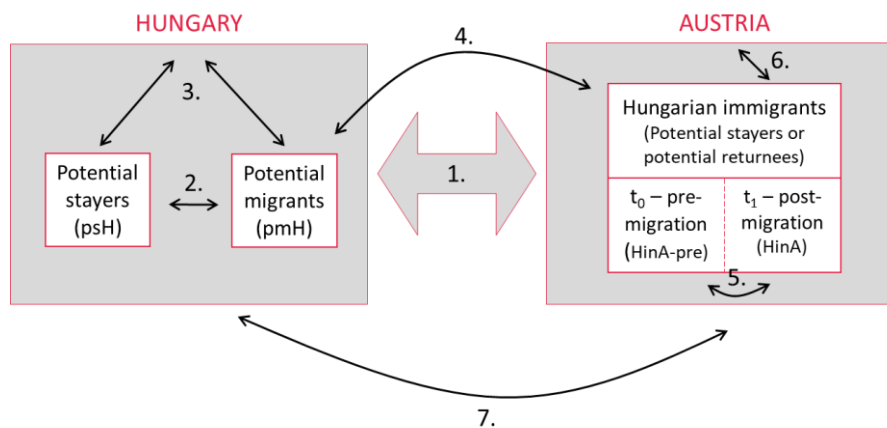
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<sup>17</sup> Of course, these are not internally homogeneous categories. Priorities and satisfaction with the well-being outcomes may differ remarkably by gender, age, employment status, etc., which is something the project must also reckon with.

## 6.4 Expected results

How can all these building blocks be brought together? To approach the subject, we need a distinct research structure that highlights the relationships between the analytical groups (Figure 5).

Figure 5. Logical structure of the project (Source: own design)



Based on this research framework, the outcomes of the project are expected to be as follows:

### 1) Theoretical expansion of the concepts of migration and well-being.

- After reviewing the literature on migration and well-being systematically, we will detect the potential linkages between these areas and stimulate further cross-disciplinary research activities.
- After some fine-tuning, the proposed research structure will be suitable to integrate both directions of the relationship into one conceptual framework: the change of SWB as a consequence of migration and the effects of SWB on migration potential.
- Moving away from the traditional utilitarian approaches, the project will help us to capture the underlying complexity of SWB and its relationship with the objective material and social factors adequately.
- Analysing macro trends of the changing well-being scores, we will answer the question whether people's overall SWB tend to revert to a set point once the direct impacts of a shocking event (Covid-19) have dissipated, or whether permanent changes in life satisfaction – in relation to the long-term, indirect effects of the pandemic – are also observable.
- The project will provide a dynamic perspective and allow for empirical tests of further hypotheses regarding the mechanisms of SWB alterations in the context of migration (e.g., the tunnel effect, the relative income, and the income rank hypotheses). Finally, the project will also reflect on De Haas' (2021) recent aspirations-capabilities concept.

## 2) *Explaining concrete migration processes by applying the concept of well-being.*

Applying a mixed-method approach, the project is expected to shed light on:

- The Austria-Hungary SWB gap

We will consider the main differences in subjective well-being patterns and their objective drivers in Hungary and Austria, contextualize the subsequent research activities, and enable a better understanding of the drivers behind migration across the “iron curtain of unhappiness”. The existence of secondary data from 2013 to 2022 enables a temporal analysis of the changing macro-structural conditions as well as of the impacts of the pandemic on the migration flow and the SWB gap between Austria and Hungary (*relation 1 in Figure 5*; sources: EU-SILC Austria, Hungary; microcensus Hungary; alternative data sources such as ESS or World Value Survey; other databases, e.g. Eurostat).

- The SWB → migration nexus

- We will also shed light on the way in which material aspects and social relationships influence people’s subjective well-being and on the way in which SWB affects migration intentions/decisions. Furthermore, we will capture the circumstances under which non-material factors may or may not counter-balance the importance of material aspects for potential stayers and migrants in Hungary (psH, pmH) and the reasons for and means of being able to do so. *Relation 2* will be used to answer the question whether dissatisfied people are more likely to show a higher emigration intention or whether the opposite in fact is true (source: MIGWELL survey and interviews in Hungary).
- The direction in which the mean values of key SWB variables have changed in Hungary between 2013 and 2022, and the way in which this trend has influenced migration intentions will be investigated. The comparison of 2016 microcensus data – which allows us to link SWB and migration intentions directly in a sub-sample – and the 2023 MIGWELL survey will answer the question whether the migration potential has increased or decreased in general (*relation 3*; sources: EU-SILC, microcensus and MIGWELL survey in Hungary).
- The next question is whether the pre-move SWB pattern for Hungarian emigrants (HinA-pre) was similar to or different from that of the Hungarian ‘average’. The same question can also be asked for potential migrants and stayers at the time of conducting the survey. *Relation 4* will identify the permanent and strongest factors that have been playing a crucial role in the assessment of life satisfaction and migration decisions over a longer period and will shed light on how migration intentions are in fact realized (sources: MIGWELL surveys and interviews in Austria and Hungary; EU-SILC Hungary).

- The migration → SWB nexus

- The dynamics of SWB change in relation to material gains and social relationships as a consequence of migrating to and living in Austria is the object of our survey here. Although there will be no opportunity to combine pre- and post-migration observations of the same persons within the time span of the project, the research framework allows for two indirect approaches towards studying this nexus: surveying respondents' retrospective evaluation prior to and after migration, and comparing sub-samples of similar socio-economic statuses at different stages of migration. These methods serve not only to confirm or reject Nowok's hypothesis of an inverted U-curve regarding chronology, but also to shed light on the differences between the short- and long-term dimensions of evaluation (for the duration of living in Austria) (*relation 5*; source: MIGWELL survey and interviews in Austria).
- We will furthermore enquire whether increased or decreased post-move satisfaction is a result of the mechanisms described by, e.g., the absolute or relative income hypotheses or whether people's perceptions of the constituents of well-being have also changed through migration (adaptation, temporal fluidity of well-being, changing reference group). Apart from the retrospective reports (HinA-pre), identifying the patterns of key SWB variables in the host country is also necessary to triangulate this comparative analysis (*relations 5 and 6*; sources: EU-SILC, alternative data sources including ESS, the MIGWELL survey, and interviews in Austria).
- We will identify the similarities and differences between Hungarian immigrants' pre-move expectation toward and post-move experience with migration-induced SWB change (HinA, HinA-pre), and compare these with the current expectations of potential emigrants from Hungary, who might have similar aspirations (pmH). If potential emigrants consider successful emigrants as a reference group, this analysis may justify the existence of the tunnel effect and furthermore highlight the importance of migrant networks (*relations 5, 7*; sources: MIGWELL surveys and interviews in Austria and Hungary).
- Retrospective evaluation will be useful in the case of *returnees* too, who constitute a subgroup within the main analytical groups in Hungary. Since the quantitative survey is inappropriate to reach a reasonable number of people who have returned from Austria during the last two years, they will be studied through narrative interviews. Returnees' reflections on the material, social, and subjective dimensions of well-being – parallel to those of the Hungarians who have remained in Austria – will provide valuable information about the mechanisms of individual and familial decision-making during the Covid-19 crisis. Beside the international macro statistics, these interviews will also enable micro-level estimations of the impact of the pandemic and its longer-term economic consequences for migration processes.



### 3) Facilitating effective policy through improved theory and empirical results.

Taking into account both the countries of origin and destination, almost all major policy fields are in some way affected by migration: family, the labour market, education, housing, etc. A paradigmatic shift in the perception of well-being is required to navigate these in a more effective direction. Understanding the factors truly important for determining people's well-being beyond the myopic focus on wealth, and the way in which these factors influence migration decisions (or vice versa: the way in which the subjective well-being change as a consequence of migration), is crucial when considering how decisions are made about public resource allocations. By ensuring access to employment, housing, schools, or health services, policies both on a national and local level can remarkably affect people's decisions, whereas small interventions can sometimes already suffice to bring about change. Since migrants are especially exposed to the socio-economic consequences of the Covid-19 crisis worldwide (OECD 2020), this is especially true during and after such a turbulent period with uncertainties in all areas of life.

In building knowledge about the patterns of individual and household trade-offs, we can also draw conclusions about potential macro-level outcomes. Clarification of labour market aspirations of potential migrants or potential returnees depending on their educational and career background and their SWB may further a deeper understanding of labour-market resilience (and the preparation of decision-making, cf. Lengyel et al. 2017). In furthering an understanding of strata and the group-specific impact of migration on family relations, the project may also contribute to the better establishment of family policy goals. An answer to the question whether young emigrant families intend to return to Hungary or permanently stay in Austria would for instance be valuable information for both countries. Trans-national families, remittances, brain gain and brain waste, integration paths, return migration, the question of welfare allowances for migrant families – all of these phenomena can be seen through the prism of the SWB-migration nexus.<sup>18</sup>

Giving proper responses to these challenges requires strengthening the empirical evidence base. Although MIGWELL is first and foremost a research project, its target audience also includes policy makers. The project is expected to facilitate more effective policy interventions in both countries by improved knowledge of the SWB-migration nexus.

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<sup>18</sup> About the implications of the well-being agenda for public policies see e.g. Bache and Reardon 2016.

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