Migration and social transformation
engaged perspectives

Ronaldo Munck | Tanja Kleibl | Maria do Carmo dos Santos Gonçalves | Petra Daňková
Editors

Migration and Social Transformation: Engaged Perspectives

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NUDGING THE KNOWLEDGE PROJECT OF UNIVERSITIES THROUGH ENGAGED PARTICIPATORY RESEARCH

Ahmed Bawa
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There is daily coverage in the media of the challenges and travails of migrants and refugees forced to leave their homes and cross borders and continents to seek security and better life opportunities because of wars, despotism, famines and economic devastation. Much violence they experience is perpetrated by state forces as they journey across borders and oceans. Since 1996 it is estimated that some 75,000 migrants have sadly lost their lives. With more than 280 million migrants in countries other than their country of birth in 2020 and a 2009 estimate of a further 740 million migrants in the countries of their birth, a scholarly book on migration is important. This book on migration though, is important in other ways. It is a multinational effort that brings diverse bodies of learning into conversation with each other. It explores ways in which engaged, participatory research shifts the nature of the narratives and the understandings that flow from them by ensuring that voices of migrants are heard and articulated. In doing so it reallocates the spatiotemporal position of observer and observed, as one might say in quantum physics, creating the potential for new understandings.

Why is this important?
University and science systems around the world are experiencing increasing pressures from multiple shifts in the local and global contexts in which they find themselves. The grand challenges facing humanity, among them the intensification of global warming and its impact on the human condition, have sharp consequences for knowledge intensive institutions. At no time has it been more important for scholars to work towards the development of open science platforms and imagine the evolution of a global commons of scholars and scholarship. Rapid

shifts in geopolitics and emergence of new narrow nationalisms threaten to fracture these global scholarly efforts. Furthermore, and not unrelated, galloping anti-intellectualism and the growing distrust in science and experts raise questions about the future of universities and other knowledge-intensive institutions.

The CoViD-19 pandemic produced a severe stress test on higher education. Much repurposing of research generated a global effort to rapidly address its impact. Institutions rushed to find alternative approaches to the delivery of their core mandates, primarily through the rapid adoption of digital technologies. One saw the accelerated use of artificial intelligence in drug discovery, new approaches to scholarly publishing and the creation of vast international networks of scholars working at r pid pace. But the pandemic also unleashed significant pressures on scholars as they pondered the stresses and strains on science at the sciencepower-politics-profit nexus. And as we saw with the hopelessly iniquitous distribution of vaccines, CoViD-19 also provided a lens into the future of the internationalisation of science as science diplomacy intermingled with existing and emerging geopolitical battles. At a time when so many of the grand challenges facing humanity are simultaneously intensely local and global, we are seeing the rapid unweaving of the fabric of internationalisation of science with possibly devastating impact on our ability to address those challenges.

Much of the response of higher education has been to address what is perceived to be an insufficiently developed communication strategy that speaks more effectively to the public about what is going on in the universities and how universities are contributing to the public good. No doubt this will help but this does not solve the problem. A more fundamental change is required to address the serious erosion of trust in higher education, science and experts. And this speaks to the need for a reimagining of the knowledge project of universities.

This collection of papers on human migration may hint at what kinds of steps may be taken to address this issue. At the heart of the reimagining of the relationship between universities and society is to ponder the nature of the knowledge project of university systems and their impact on teaching/learning and

research/innovation. Focusing attention on the sociopolitical orientation of the work of universities means focusing on the methods of knowledge production and dissemination. One example of this, we learn from this collection, is building knowledge through the participatory engagement of researcher and researched, creating the space for diverse approaches to knowledge generation, continuously working towards building the global commons of scholars and scholarship, and so on.

Perhaps of most consequence is the idea of shaping research in the context of applications imperatives rather than purely academic ones, designing for impact, understanding that deep academic insights might be derived from knowledge projects shaped in engagement within the cauldron of life. This helps to shift agenda setting by broadening the base of co-creation of projects, bringing together interdisciplinary teams since the 'real world' is intolerant of disciplinary boundaries and understanding the need for multiple forms of outputs, beyond the usual peer-reviewed journal articles or book chapters.

This book project, arising out of an ethos of engaged, participative research is an avenue for multiple explorations in the production of knowledge and its dissemination. Universities are knowledge-intensive institutions of a special kind: they have students. As these kinds of research enterprises become more prevalent, they will feed into undergraduate education allowing for students to engage knowledge across disciplinary boundaries and bringing to the fore the importance of considering the use value of their engagement with knowledge (and its production and dissemination) rather than just its transactional value; thereby inculcating in them the capacity to engage in ethical and critical reasoning in the context of engagement at the nexus of theory and praxis.

Universities are created and sustained by societies because they are deemed to be essential for the effective functioning of the multilayered political economies in which they are embedded. To repeat, they are special as knowledge intensive institutions because they have students. They bear the responsibility to provide students with learning experiences that make them active, engaged citizens and to foster their intellectual and social

growth, their creativity and innovation. Notwithstanding the vast changes taking place in higher education through the implications of the digital technology revolutions that are sweeping across all sectors of human endeavour, the searing imperative for progressive scholars must be to address the vast challenges facing humanity and to do this in a way that addresses the education of new generations of graduates who have a vivid peek into the vital role they may play in a world that threatens to be more fragmented, more devastating of the human condition and where the human-earth nexus is on a path to destruction.

As the world reels from the combined health, economic, political and moral crisis we are in, there is more need than ever to reimagine and remake our futures. With our thinking and our very bodies under threat from all forms of oppression and disinformation, we need to find ways to sustain and empower the more vulnerable amongst us. This volume brings together a unique set of thinkers/teachers/activists from across Europe, Africa and Latin America. We are committed to inter-displinary research and the breaking down of boundaries between research and social transformation.

This volume is the first product of an emerging research and practice network, the Migration and Social Transformation Network (MSTN), that is committed to pursuing a new agenda, which seeks to turn migration/refugee research into an active partnership with society, to address the pressing social needs of migrants who suffer from a range of exclusionary processes, not least those based on racial, gender and class differences. The main principles of this transnational engaged research-policy-practice network are:

- Migrant protagonism: it is the agency and resilience of migrants and refugees that we see as central to the complex process of people's mobility in the era of globalisation, this is the epistemological and institutional driver of MSTN's objectives;
- Intersectionality: it is the construction of race, gender, class and ethnicity divisions that are at the core of the migration processes, these divisions can be exacerbated or mediated by the migration process and the role of civil society in the transit and destination countries;
- Importance of the care economy and emotions: moving beyond 'rational' explanations of migration, it is not only the political economy of migration processes that matter, but the way they shape and are shaped by the international care economy, and attention to emotions and meaning-making;

- Participatory action research: this implies giving voice to migrants and refugees in a process of co-research and co-production of knowledge, experiential learning is key to a transformative strategy as is the sharing and analysis of that experience;
- Centrality of life and dignity leading to social transformation: we need to create safe democratic spaces where transnational migrants and refugees can find voice and share their experience, moving towards the transformation of society to offer decent work and a dignified life for all.

Our emphasis, overall, will be on the complexity of migration movements and South-South migration, decentering the corridors emphasized from a European or US perspective.

Migration has claimed center stage in policy and political debates in various parts of the world in recent years and transforms (for better or for worse) the lives of hundreds of millions of the people every year who migrate. Beyond this, migration dynamics influence those in the communities of origin who remain voluntarily or involuntarily, immobile and transform whole societies at all points along the migration routes. Thus. We clearly need to look beyond the nation state as a self-contained domain where migration happens, a tendency still dominant in social work where methdological nationalism is not really questioned.

In the public discourse in the European Union and the United States, immigration has been cast as a dangerous and unwanted phenomenon that must be prevented at almost all costs. As we write this introduction, German media reports on extensive violent push backs of asylum seekers carried out by the coast guard in Greece or by regular police units in Croatia[1]. These are not just isolated cases of nations not able to control members of their military and police force, but expressions of a trend that

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[1] https://www.spiegel.de/international/europe/greece-and-croatia-the-shadow-army-that-beats-up-refugees-at-the-eu-border-a-a4409e54-2986-4f9d-934f-02efcebd89a7

created spaces and groups for whom basic human rights do not apply. Since 2015, the EU has focused increasingly on what is called the 'externalization' and 'securitization' of its border controls. In this process, migration is, what we might call, 'irregularized', with almost no regular migration paths from many countries in Africa, Asia or Latin America. The access to international protection is restricted through attempts to prevent people from ever leaving their home countries or regions and escalates further due to illegal push backs on the EU's external borders. In Africa, political leaders have been quick to adapt EU strategies for their own purposes and to claim their entitlement to not respect international law. This was the case with the repeated claims of the Kenyan government to need to close down refugee camps due to limited international funding and alleged security threats.

All these developments underline that, for a long time, migration was perceived and studied almost exclusively from the point of view of the so-called 'receiving countries'. However, another narrative is emerging amid the intensive attention to migration in recent years. There have been increasing efforts to 'decolonize' migration studies, which have led, in turn, to an intense scrutiny of classical theories and their assumptions about migration.

It is no coincidence that the first-ever Africa Migration Report carries the sub-title 'Challenging the Narrative'. In the introduction the IOM Representative to the AU, Maureen Achieng and AU Commissioner for Social Affairs, Amira El Fadil write:

> 'The existing reality of African migration is that Eurocentric approaches to managing migration currently dominate domestic and regional policymaking on human mobility in Africa. The securitization of borders in the Sahel, for example, appears to respond mostly to European security imperatives and not nearly enough on the reality of thousands of years of itinerant trade across the Sahara Desert' (ibid p3).

In the last decade, the attention of migration research has shifted from seeing migrants as either rational actors or passive victims of structural processes, to a growing recognition of the agency of migrants, often amid adverse conditions. In this book, we are interested in the change that occurs when we center our attention on migrants as active protagonists in their migration biographies. This is not an idealized view that is blind to the above-mentioned macro-level dynamics, but one that strives to understand migration from the perspective of those who migrate. This perspective is simply missing from EU decision-making policy. Truly understanding migrants´ aspirations would help policymakers to move away from strategies based on deterrence, to policies that could create legal, safe pathways for migrants.

Migrant protagonism helps us also to see that the distinctions between refugees and economic migrants, that took institutional form in the very specific context immediately following World War II, no longer provides effective protection of the rights of those who migrate. Very many of today's migrants are 'forced' by environmental degradation, neoliberal exploitation or restrictive societal norms (women, LGBTQ persons) to move. Such imperatives are not covered by the five traditional grounds to grant international protection within the Refugee Convention.

This book

Our approach in this volume questions the traditional ways of creating knowledge in migration research. As Editors, we bring a range of experiences to the book. We are social scientists with backgrounds in sociology, political science, and academic Social Work. We have been involved practically with migrating persons through our work with NGOs and trade unions. In compiling the volume, it was important to us to bring together authors who break open the silos of disciplinal discourses and combine rigorous academic work with migrant-centered applied projects. Crucially, we set out to de-centre the Eurocentric, receiving country bias and to explore South-to-South migration processes and provide country-of-origin perspectives on migration.

The book is divided into sections on *Perspectives*, *Experiences*, and *Interventions*. In setting it out in this way, our ambition is, to

not just describe migration as detached observers, but to actively look for possibilities to co-shape vital societal processes connected to migration. To this end, in the final section we restore the tradition of social work as an academic discipline and professional practice focused on social transformation, rather than as a micro-level practice of 'control' or 'education' of persons and families deemed to have fallen out of 'normal' society. In the field of migration, social work stands perennially in the tension between co-facilitating social transformation and stabilizing the status-quo as a 'contractor' of the state and/or of international regimes (Prasad 2018). This volume pursues the goal to reclaim the political mission of social work as an active force for social transformation. Our ambition is to show how social work can be a force to actively shape policies, rather than just be a tool of migration control. Key to this more active role is to act together with, not for, refugees, based on solidarity and joint action.

The volume opens with a set of reflections or *Perspectives*, seeking to lay out some of the major issues faced by migration research today. **Ronaldo Munck** presents an analysis of what we might call the 'turbulence of migration', which needs to be seen as a complex social and spatial process, that is not reducible to the bare figures of who migrates and to where. The impasse of dominant (and also critical) theories seeking to explain these complex processes is described and an alternative is offered, centred around post-structural approaches and the lens of bio-politics.

Maria do Carmo follows with a description of, what we can call, the protagonism of migrants as an approach to research practice and the ethical and methodological dilemmas it gives rise to. Through a case study based in Tijuana (on the Mexico/US border), we see how migrants go through processes of subjectification – coercion and freedom – that creates ethical implications for research practice. It also emphasizes the capacity of agency that migrants have, their potential to act in the contexts in which they are inserted.

Next, **Rose Jaji** turns to the issue of cultural sensitivity when conducting ethnographic research with migrants, the need to situate migrants' narratives within the specific cultural contexts

in which they are generated. In relation to African migrants in particular, we have seen a tendency to deploy narratives that 'exoticize and pathologize' Africa in ways that obliterate subjectivity and agency. Culturally sensitive ethnographic research entails critical examination of concepts and categories as they apply across cultures, in a way that recognises the way in which they are grounded.

Carl Ulrik Schierup and **Aleksandra Ålund** turn to how we might develop a critical positioning of academic knowledge production in solidarity with migrant driven social movements. This necessitates a continuous exploration, 'in dialogue' with movement intellectuals, and a dialectical relation between theory and practice. Only in this way, can we counter the way the dominant paradigms have systematically marginalised 'kowledge from the ground up' as rooted in migrant communities and organisations and offer a counter-hegemonic perspective.

In the final chapter in this section, **Raúl Delgado Wise** discusses the so-called migration-development nexus that has received much attention in mainstream and policy analysis, where a virtuous circle between the two is assumed. From a 'southern', or counter-hegemonic perspective, we can deconstruct this discourse and see the much more negative impact of migration on the development process. This chapter also posits the need for, and considers the prospects of, a global governance regime for migration and the mechanisms through which it could emerge.

The second section of the book deals with *Experiences* drawing on the theoretical and practical knowledge of many of our contributors of migration in Africa, Europe and Latin America. It begins with an analysis by **Nikos Xypolytas** of the methodological impasses of migration research in south-east Europe. The problematic emphasis on immediate policy suggestions has resulted in a well-documented inability to produce valuable and consistent migration research agendas. He argues that we should see migration as a long process, the analysis of which requires a holistic understanding of events and changes occurring in the countries of origin, in intermediate

countries and lastly in host societies. This, rather than just focus on the host society.

The **Research Group on African Migrations and Afro-descendants in Argentina** (GIMAA) turns our attention to its engaged research on a South-South migration process. It seeks to develop our knowledge around African migrations and Afro-descendants in Argentina specifically. It does so through a reflective qualitative approach in the anthropological tradition, which explores the meanings and interpretations that the subjects themselves assign to their social dynamics, in a process of dialogue with the researcher. They also detail some of their experiences in their active participation in activities seeking rights for migrants and Afro-descendants.

Janet Munakamwe takes up the narratives of migrant domestic workers in South Africa – who face discrimination in multiple ways at the intersection of gender, class, race, ethnicity, and nationality. The research was conducted in the wake of the COVID-19 pandemic and shows how existing, state-crafted, social protection policies, particularly social security, exclude the 'subaltern'. It also points to the role of Migrant Rights organisations who have led struggles for inclusion, with support from agencies such as the International Labour Organisation (ILO) as well as local civil society groupings.

Lelis M. Quintanilla Noriega takes up the critical issue of Internally Displaced Persons (IDPs), with the focus on Mozambique. She addresses questions such as: what are the main causes behind their enforced move? What are their experiences as they travel from home to their 'new home'? what are their fears, vulnerabilities, new realities? The chapter shows how Internally Displaced Persons impact on the economy, climate change, development, physical and mental health, and social networks, and also compares urban versus rural displacement.

Firminus Mugumya, Marion Mugisha Mutabazi and **Sylvanus Mushabe** turn our attention to the issue of the vulnerability and resilience of children. They focus specifically on the refugee encampments of Rwamanja and Nakivaale in Uganda and the situation of children therein. They show the extent to which refugees build resilience at individual, household, and

community level to overcome/mitigate difficult situations, particularly in relation to the provision of children's education. The chapter also highlights the policy and practice implications of addressing the psychosocial and material needs of refugees.

James Ekene Obi looks to the situation of LGBTI people in sub-Saharan Africa and the extreme difficulties they experience. They argue that social workers need to bear in mind that they are dealing with profoundly damaged 'clients' – many of whom have experienced ostracism by family, church and community. Many have also been victims of recurring assaults and lynchings. Others have spent months in overcrowded, dirty, violent prison cells. In this context, the social worker is called upon to help them build confidence and self esteem and foster a community spirit amongst them.

In the final section, entitled *Interventions*, our authors hone in on a number of issues pertaining mainly to social work with migrants and refugees. **Ndangwa Noyoo** and **Mziwandile Sobantu** interrogate migrations and social transformations in Africa from a social work perspective. Deploying discourse analysis, this chapter critiques the negative discourses and narratives on migration of Africans to Europe. Through this, it demonstrates how social workers are caught up in a negative spiral that conspires against mutual understanding between migrants and settled populations. They suggest ways in which social work can address such issues.

Oncemore Mbeve, Thobeka Nkomo and **Jo Vearey** address the role of social work in developing migration-aware HIV responses for young migrant men in Johannesburg. In this chapter the authors show how migrants, including internal migrants, experience challenges in accessing HIV health services. Their analysis connects both micro (individual) and macro (policy) level social processes that are fundamental in the interventions for HIV in the Southern Africa region.

Next, **Casmir O. Odo** and **Ngozi E. Chukwu** discuss family reciprocal expectations and youth irregular migration in Nigeria. Family pressure on the young people is seen to be a key driver of irregular migration in Nigeria. This chapter explores the various patterns shaping increasing irregular migration of Nigerian

youths, and the effects this has on families, particularly with regard to the care of the elderly. It also looks at the broader implications for social policy and social work practice in Nigeria.

This is folllowed by an analysis by **Roberta T. Di Rosa** of the way in which migration has led to an internationalization of social work in Italy. This chapter discusses the new emerging challenges facing social workers in managing local situations linked to world-scale processes. These include challenges such as trafficking in human lives, responses to disasters and now, the COVID-19 pandemic. It also argues that contemporary migration policies and practice in Italy show up the inadequacy of the social work response to the migration issue

Finally, **Tanja Kleibl** and **Nikos Xypolytas** examine in broad conceptual terms the contradictions inherent in the role of social work in the context of migration management. It is operating within a system that refuses the recognition of refugees as equal citizens, and as agents possessing agency and human rights. Thus, it can act as an organic intellectual of the dominant order or it can, through the development of political consciousness and understanding of culture be part of the struggle for social justice for all.

PART I: PERSPECTIVES

1. MIGRATION AND SOCIAL TRANSFORMATION: THEORY AND PRACTICE

Ronaldo Munck

To situate the various chapters in this text it would be useful to present some kind of opening overview. We examine first what has been called The *Turbulence of Migration*, a complex social and spatial process that is not reducible to the bare figures of who migrates, and to where. From the era of colonialism to that of migration, people have moved, both within countries and between them. Yet we find there is now a *Theoretical Imp*asse in the dominant (also critical) theories seeking to explain these complex processes, usually rendered through abstract economic reasoning. We begin to offer alternatives here, centred around post-structural approaches and the lens of bio-politics. This leads us to a consideration of what we consider a radical new lens for the analysis of migration and social transformation, namely *Migrant Protagonism*. Rather than start from the structural features of the migration process we focus on the active will of the migrant, their lives and aspirations. We round off our analysis with a wider lens around *Engaged Research* now coming to the fore in both the policy and critical research fields. This is research which is community based rather than an arm of the state, it is transformative rather than instrumental. We advance this as a contribution to a new paradigm for a better, critical understanding of migration and social transformation.

The turbulence of migration

The World Migration Report 2020 (IOM 2019) provides us with a snapshot of what global migration looks like in terms of bare numbers. It is estimated that in 2020 there were 272 million migrants worldwide, with two thirds of these being labour migrants. This was a small percentage of the world's population – 3.5 percent to be precise – though in some countries this figure was obviously higher. The proportion of men and women migrating was, more or less, equal. The top destination country remains the United States (with 50.7 million international

migrants) and the country with the largest number of migrants living abroad was India with 17.5 million people. Refugees continue to represent a significant proportion of migrants with the Syrian Arab Republic and Turkey representing the country of origin and host country accounting for most refugees with 6.7 billion and 3.7 million people respectively.

The globalisation of migration is defined by Stephen Castles as 'the tendency for more and more countries to be crucially affected by migratory movements at the same time' (Castles 2007: 5). International migration today is, in short, part of the revolutionary globalisation processes which are reshaping economics, political systems and our whole cultural parameters. Migrants have become a symbol of this new era of fluidity, impermanence and complexity in this context of time-space compression: time is hugely accelerated, and the world is virtually shrinking. What is immediately apparent from the data is that only a quarter of international migrants go from the global South to the global North, while not quite two thirds move within the global South. The reality of globalisation is that it is a geographically uneven process with poles of development within the global South promoting labour migration and conflict.

Even a cursory examination of the migration data shows us that the media image of South to North flows across the borders of North America or Europe are only part of the picture. Yet we need to go further to counter the demonising of migrants in much of the media. As Bigo puts it, the state is portrayed as an endangered body in a narrative where the migrant 'works as a political demonology through which politicians construct a figure of the enemy to generate a counter-subversive discourse and a law-and-order program' (Bigo 2002: 69). Migrants are seen as people who transport drugs in their bodies, smuggle guns across borders and may be the bearers of deadly illnesses. Migrants are viewed as a threat to security but also to cultural identity. Where a nation is defined by ethnicity, then minority ethnic groups more supposedly 'integrate or assimilate or run the risk of being marginalised or, at worst ethnic decreasing'. All migrants exist under these clouds of suspicion and demonization.

Nor does migration consist of an undifferentiated 'migrant' as a self-explanatory concept, rather it is divided by class, gender and 'race'. Migration processes are clearly patterned along gender lines, in the same way as national labour markets are segmented along gender lines. Migration also shifts and restructures traditional gender divisions of labour, the nature of the household and of the community. As to 'race', as Philip Marfleet puts it 'immigration control, racism and exclusion are inseparable' (Marfleet 2006: 8). Racist and xenophobic discourses are not based on a timeless notion of deference but are constantly reconstructed, especially in an era of flux and uncertainty. We need to understand that the working class was never unified on a 'pure' social class basis but always showed signs of solidarity which were based on dominant gender and 'race' positionalities that sought to exclude the other. Migrants, in some way, express that constant making and re-making of solidarities, some exclusionary and others inclusive.

To understand migration today, we need to situate it within its historical context. The modern era, the development of capitalism, saw migrants as people forced to move either in chains or in other forms of bonded labour. Today, in the early 21st century, we are seeing, as Gambino and Sacchetto describe, 'various attempts to rediscipline migrant flows' (Gambino and Sacchetto 2014: 90). Those migrants, deemed a threat to society, face the most explicit and severe barriers. There is also, as they describe, an insidious 'regimentation of migrant flows through bureaucratic procedures', not least through the formal and informal recruitment of workers in target countries. Migrant agency and autonomous strategies for movement and survival are constantly faced with a migration machinery that seeks to regiment their flows and move them through unitary and controllable channels. The maelstrom of migration – now as in the past – is not so easily controlled in practice.

Finally, we need to understand the complexity of migration in the era of globalisation. It is not simply a question of globalisation lifting the barriers to the movement of people as it has for the flow of capital, finance, images and consumer goods. As Papastergiadis puts it "the turbulence of migration is evident, not

only in the multiplicity of paths, but also in the unpredictability of the changes associated with these movements" (Papastergiadis 200: 7). It is only through this complexity lens that we can make sense of the bare figures as reported by the IOM 2020 report. There are no hard and fast boundaries between forced and voluntary migration, legal and non-legal migration. Or between 'economic' and 'non-economic' migrants. Above all, as John Urry puts it 'these migration patterns are to be seen as a series of turbulent waves. With a hierarchy of eddies and vortices, with globalism a virus that stimulates resistance, and the migration system a cascade mowing away from any apparent state of equilibrium' (Urry 2000: 62).

A complexity lens does not separate out the structures and processes of migration or establish a logical reparation between stability and change (as we shall see in the next section on theories of migration). It is not some universal all-embracing category of 'globalisation' or the 'need of capital' in the abstract that drives migration but, rather, the actions, aspirations and dreams of millions of people. And it is in that imagination of a better future that we see the possibility of alternative futures. As Hardt and Negri once wrote, 'A spectre haunts the world, and it is the spectre of migration. All the powers of the old world are allied in a merciless operation against it, but the movement is irresistible' (Hardt and Negri 2000: 213). We shall examine next how existing theories of migrations, especially those based on economics, have failed to explain that irrepressible desire for free movement.

Theoretical impasse
In a recent overview of migration theories Hein de Haas has argued that 'migration studies is an under-theorised field of social-scientific enquiry, in which the recent trend has been one of theoretical regression rather than progress' (de Haas 2021:2). This is at once somewhat surprising, but also understandable insofar as migration is a complex issue and probably not one explicable by a standalone 'migration studies' approach. What we have seen, taking a long view, is the development of a series of mainly unconnected theories or models that have never amounted to a holistic explanatory framework. The dominant

theoretical frame has been an economic one, based around a 'push-pull' model as the mass explanation. This approach was, and is, one-dimensional, based on a reductionist neoclassical model of the rational individual. This model cannot explain why more people do not move in pursuit of better wages and living conditions, nor why there is more migration from some countries than others.

Neo-classical migration theory (see Harris and Todaro 1970) was based on a functionalist approach to society; where all aspects – institutions, norms, rules, etc.- serve a purpose that is essential for its survival. These models assumed that individuals all make rational decisions to maximise income, based on disparities between sending and receiving countries. The counter-flow of capital from the receiving countries to the (poorer) sending countries would lead to a decrease in the income gap in a win-win scenario, or economic optimisation strategy. There was a variant, known as the New Economics of Labour Migration (see Stark 1991), which shifted emphasis from the individual to the household, and to the notion of diversifying, not just maximising income. Nevertheless, these options continued to conceive of households and individuals, as rational economic actors. There is very little sense of the violence that can be exercised by capital and the state, nor how poverty and inequality constrain, or drive, decision making in extremely oppressive conditions.

Most recently, the theory of 'migration networks' has tended to dominate in critical thinking about migration. The relations between migrants and their friends/relatives at home act as an information network; this also builds social capital and facilitates further migration. Migration can thus become cumulative and self-perpetuating over and above any particular push-pull factors operating in a given situation or period. There is also increased attention currently being paid to the family or household theory of migration. The focus here is on the household as a relevant decision-making unit, rather than on the individual. Migration can thus serve as a strategy to diversify income and spread the risk across a household. Gender relations in the household, and in terms of migration, can be foregrounded in this approach. A

third alternative seeks to move beyond both the simplistic push-pull theories and the dualism of structure/agency explanations of its rivals. Here, the emphasis is very much on flows and on cultural hybridity, on diasporas and the complex turbulence of migration (see Munck 2009). If we accept that no new paradigm for the overall understanding of migration is about to crystallise, where does that leave us, in terms of a proactive critical understanding of the Age of Migration?

The Marxist theories of migration vary considerably of course, but they also suffer from the problems of economism and the impact of structuralism. There have been a few Marxist attempts to develop a theory of the mobility of labour and capital accumulation (see Gaudemar 1976) but it has not been a major theme. The overarching theory of capital accumulation has tended to portray workers as 'factors of production' as in neoclassical theory. At most, what we find from the 1970's onwards, is an emphasis on dual labour markets with migrants filling the lower precarious layer. Migrants are most often subsumed under the category of 'reserve army of labour', that for Marx acts as a reservoir of workers to meet the needs of labour. The problem with this economistic and, indeed, functionalist view of migrants is that they are reduced to filling an allotted role in anonymous structural economic processes and are seen as devoid of any human agency.

In a sense, all economic theories of migration – be they neo-classical or Marxist – suffer from, what Brazilian political philosopher, Mangabeira Unger calls 'false necessity' (Unger 2004). Put simply, this is a belief that things are how they are due a deep underlying necessity. It is easy to see how this can lead to a belief that things can never change. Necessitarian thought, argues Unger, is part of both liberal and Marxist tradition, that we need to transcend through an anti-necessitarian social theory. Against a structuralist analysis that sees societal and political institutions as set in stone, we can, on the contrary, look at the 'plasticity' of social organisations and their polemical to be shaped in new ways, rather than seek law-like explanations for complex social processes – in our case migration – we can instead seek to liberate humanity from these seemingly 'necessary'

arrangements and to explore the potential for alternatives. A world without constants, where potentials can be realized.

To exercise our own imagination here and explore alternative paradigms or 'ways of seeing' (Berger 1972) we need to move beyond structuralism. Structuralism emerged in the 1960's, practically as a universal human science from economics to sociology, ethnology to psychoanalysis. It rejected previous humanist modes of thought such as existentialism and phenomenology that focused on the freedom and experience of the individual subject. Instead, the focus was on 'deep' structures that supposedly determined the outcome of individual subject's desires. While structuralism – for example in development theory – achieved considerable insights and injected some urgency into critical enquiry, it also tended towards a formalism where structures took on a life of their own. Hence, in the 1980's, various forms of post-structuralism emerged that sought to 'deconstruct' the structuralist approach and its faith of Enlightenments of constant progress towards modernity.

This is not the place to carry out an analysis of the varieties of post-structuralism, but we can think of how it might help us deconstruct the dominant theories of migration. We need to see history as less determined by structures that we used to do. It is much more arbitrary, contingent and singular. The human subject is never dominated totally, or determined, by the structures of society. The more molecular, less structured society we have today is more subject to a 'molecular revolution', rather than an overthrow as a cataclysmic event. Power is not confronted by science but, rather, by desire. As Deleuze and Guattari put it 'revolutionary theory cannot liberate anyone by telling the "truth" about political economy; the only true liberation occurs at the level of desire' (Deleuze and Guattari 2003:121). With migration becoming a central global phenomenon, we can see how the experience of migration (and the desires it expresses) is superseding old ideas of belonging, identity and fixity.

Migrant protagonism
The CSEM (Scalabrinian Centre for Migration Studies) has articulated a clear political philosophy to support the need for

migrant protagonism in a critical migration studies: 'it provides concepts and reflections that foreground the agency of subjects in movement, their capacity and potential to act, impact and transform facts and their meaning' (https://www.csem.org.br/institucional/). They are resilient in the face of challenging situations, and they participate in society in diverse ways. Migrants and refugees are not victims, as portrayed in much Northern coverage; rather they are agents and contribute to the 'making' of migration, that is not just a disembodied structural process. As E.P. Thompson once said in relation to the working class that emerged out of the industrial revolution 'they are present in their own making' (Thompson 1970: 3). Migrants, like other workers, are not a social category, determined by hidden structures, they are constructed, shaped and understood as part of human relationships.

The movement of labour has always been an integral part of the making of the labour movement (see Munck 2019). There have always been flows of workers across national boundaries and these have shaped both capitalism and the labour movement. These migrants have also transformed the labour market, both in quantitative terms and in qualitative terms, making it increasingly global and not just international, while also changing the gender composition of labour migration. If globalization created a far more mobile world for capital and finance, it could not fail to impact on the world of labour. There is also a growing importance of place in the determining of life chances. Based on Milanovic's calculation, we find that, while in the mid 19th century, the role of social class represented 51 percent and location 49 percent, at the start of the 21st century 85 percent of the global Gini (inequity) coefficient is down to 'place' with only 15 percent ascribed to class position (Milanovic 2012: 20). The shift from 'proletariat' to 'migrant' as revolutionary subject can be ex appended of course but this differential is stark.

Hardt and Negri go further in presenting the migrant as the archetypal globalised subject due to their 'irreplaceable desire for free movement' (Hardt and Negri 2000: 213) on the basis that throughout modernity 'the mobility and migration of the labour force have disrupted the disciplinary condition to which workers

are constrained' (Hardt and Negri 2000: 212). We do not need to accept this picture in full to realize the importance of not portraying migrants as always-already victims. In terms of their category of the 'multitude' seen as the opponent of the new global capitalism, Hardt and Negri, argue that migrants are a key component of it; they 'treat the globe as one common space, serving as living testimony to the irreversible fact of globalization' (Hardt and Negri 2000: 34). Perhaps romanticising the situation, they argue that 'part of the wealth of migrants is their desire for something more, their refusal to accept the way things are' (Hardt and Negri 2000: 133) that prepares them for ongoing resistance against exploitation.

As against the rational economic actor of neoclassical theories of migration, we need to now foreground the bodies of migrants that cross borders and face a range of hostile circumstances. That is why the above discussion of the migrant and globalisation needs to be placed within the context of, what Michael Foucault and others call, 'bio power'. The new paradigm of power, articulated by Foucault, was one where power regulates life from the inside as it were, hence the term bio-power' and the terrain of 'bio-politics'. Life itself becomes an object of power and society is the realm of bio power. Power is no longer seen as only disciplinary, but as reaching down to the very bodies of the population. As Foucault puts it is 'a power that has taken control of both, the body and life or that had, if you like, taken control of life in general with the body as one pole and the populations as the other' (Foucault 2004: 253). This contemporary form of political power is immediately relevant to understanding the figure of the migrant.

There is now a flourishing literature on migration from a bio-power perspective that may feed into the 'migrant protagonism' perspective of this volume. We may start with Martina Tazzioli's argument that 'migration categories ultimately aim to discipline bodies and conducts in spaces' (Tazzioli 2015: 177). The whole panoply of terms such as legal migrant, illegal migrant, 'guest worker' and the visa regimes, are all part of a process of control, a form of bio-power. Migration can thus be seen as a social relation imbricated in a struggle field and we can thus, following

Tazzioli, examine 'the strategies of resistance and the practices of freedom enacted by people refusing the government control over conducts and bodies' (Tazzioli 2015: 172). The chapters in this book turn precisely to these practices and the role they play in the creation of, and resistance to, the social relation we call migration. Bio-power is also a very useful and productive lens through which to understand the discursive construction of anti-immigration policies and politics (see Apatinga 2017).

A further concept that needs to be considered is that of 'intersectionality', to set the frame for the complex but inter-related class, gender and 'race' oppressions. Emerging from debates in black feminism, the concept is usually defined as a lens through which power is examined in its intersections and interlocking modalities. It established a new agenda for gender studies, centred around the differences between women and the complexity of forms of oppression. In some ways it was a contemporary rendering of the 'old' Marxist trio of interlocking class, gender and 'race' oppressions. Helma Lutz, and co-authors, recognise the dangers of its adoption in other situations, for example in Europe where 'the distinction between activism and scholarship has been very strictly adhered to' (Lutz et al 2011: 9). In the global South there has also been some resistance to a concept that does not necessarily travel well to a situation where colonialism and post-colonialism still mark, and even dominate, social relations. Nevertheless, we can see it as a step forward, insofar as it focuses on the inter-locking of systems of oppression. An intersectionality frame directs us to the need to understand how it might lead to 'transversal' ways of constituting the new 'multitude'. Transversality can be seen as a new form of collectivity cutting across traditional national and class forms and the refusal to speak for others. These new solidarities cannot be built on 'old' categories of working class 'unity' or 'united fronts'. There is no longer a pre-existing subject of articulation 'the' working class and the transversal collectives are always polyvocal groups. Above all, solidarities need to be constructed, recognising, as Featherstone points out, the importance 'of engaging with the decidedly uneven racialized, gendered and classed impacts' of politics (Featherstone 2016:   182). In this way

we can conceive of how subaltern mobilities can forge opposition to neoliberalism 'from below', as it were, and become part of a broader counter-hegemonic alternative.

Engaged research

Over the last decade the concept of 'engaged research' has come to the fore in European research management circles. It is defined as 'a wide range of rigorous research approaches and methodologies that share a common interest in collaborative engagement with the community and aim to improve, understand or investigate an issue of public interest or concern, including societal challenges' (IRC 2017). At this level, engaged research has become a modality within university-based research that brings it closer to communities. The degree of 'collaboration' or 'engagement' is variable, and one could think of this initiative in quite instrumental terms, practically as a way of achieving societal 'buy in' for technology and big data initiatives with active participation of the private sector.

More radical definitions have, however, emerged in the global South where community participation and action, often with a gender focus, have critiqued the instrumental and extractive nature of engaged or community-based research when done 'from above'. This more radical form of engaged research goes back some decades. For example, such was the approach of Paulo Freire (1970) in Brazil and of Orlando Fals Borda (1991) in Columbia. It was ultimately a research philosophy that combined academic knowledge with community knowledge. This was part of a broader move at the time to promote a humanist approach to education and research, which foregrounded the subjective experience of ordinary people. This reflexive-critical approach, or method, has now become quite widespread though not, until recently, in migration studies which have tended to be more state centric, rather than 'bottom up'.

Another way in to 'engaged research' is via a feminist standpoint as outlined by Sandra Harding, 'the experiences arising from the activities assigned to women understood through feminist theory, provide a starting point for developing

potentially more complete and less distorted knowledge claims'
(Harding 2004: 95).

If we were to represent diagrammatically the basic force fields
with which a critical engaged research would be situated it might
look something like this:

Knowledge Paradigms

Instrumentalism	Transformation
Positivism	Participation
Knowledge Transfer	Knowledge Transformation
Clinical/Commercial Use	Community Use
	Society
Science	

In this admittedly polarized diagram, we can see clearly the
overall distinction we are trying to make to serve as the
epistemological underpinning for this book. On the one side we
have a positivist epistemology that sees facts as independent for
the act of observation, versus a notion based on co-participation
on the production of theory and facts.

Over recent years engaged research has begun to play a larger
part in the area of migration studies. Thus, we find Anna Amelina
(2017) examining the so-called 'reflexive turn', advocated by post
structuralism, and articulating what a 'Doing Migration'
approach might look like. It is an approach, based on a social
constructivist philosophy that sees human development as
socially situated and knowledge constructed through interaction.
It addresses some of the major deficiencies in mainstream
migration studies, such as the naturalization of borders and the
epistemological priority given to the structure/sedentary couplet
over the agency/mobility one. Discursive knowledge is
'performed' (see Butler 1993), in the sense that it is incorporated
into the institutional organisational and interactional routines of
migrations. If we are to examine how the 'doing' of migration
occurs, we need to follow much more closely the trajectory and
world views of individuals and groups that are not just
determined by structures.

Another strand of engaged research has emerged around the importance of biographical approaches, life histories and the construction of migrant narratives. Thus, Apitzsch and Siouti (2007) proclaim the importance of biographical analysis as an interdisciplinary research perspective in the field of migration studies. As against the previous German migration studies emphasis on qualitative approaches and policy reports, the new biographical approach is seen to have several advantages. The concept of biographical resources, they argue, should be at the centre of analysis insofar as 'it integrates biographical experiences and the knowledge constructed from these into experience, sense and action resources' (Apitzsch and Siouti 2007:13). Şahin Mencütek advocates a wider 'migration narratives' approach which would question how migration is narrated and which perspectives dominate in policy and politics: insofar as 'narratives are developed and negotiated with the plethora of actors operating at the local, national and global levels [and] emerge as highly complex phenomena' (Sahin Mencütek 2020: i). Standing back from the particular methodologies we may deploy in a new engaged, research- based migration we might reflect with Stephen Castles on certain basic features he believes are essential if we are to grasp the complexity of migration. One principle or thesis Castles articulates is that 'a critical and engaged sociology of migration is not an abstract postulate, but something that many socialists have been trying to create…To develop migration studies further it is necessary to work through the consequences for theory, methodology and the organisation of the research enterprise' (Castles 2007: 365). That is precisely the challenge faced by many of the authors in this book, be they social researchers or activists, and which the Migration and Social Transformation international network seeks to address. This is clearly a collective task for a new engaged migration studies that advances theory, methods and practice in an integrated way.

Another, related, thesis proposed by Castles is that 'research on migration has often been driven by the needs of governments and bureaucracies. Sociologists, who wish to achieve a critical. But socially engaged, sociology of migration, need to find ways of bridging the divides between theory, practice and policy'

(Castles 2007: 362). The enduring dominance of simplistic 'push-pull' theories of migration can only be explained by its usefulness to state planers. The constant calls for 'policy relevance' should not be confused with the requirement to provide a simple service to the government of the day to enable it to 'manage' migration. It is that call to unify theory, practice and policy that is most difficult because it poses a challenge to the positionality of the social researcher in their relationships with social movements and in the broad struggle for social transformation.

Conclusion

This introduction has endeavoured to set out the main issues and lay the basis for a new, engaged and committed perspective on migration, within a social transformation frame. Migration cannot be adequately explained by structural theories I would argue, and we need to foreground migrant protagonism. It is agency that drives the movement of people, not blind structures. And it is the imagination and struggles of these migrants, as part of the broader process of social transformation, who will, through complex transversal solidarities, begin to forge a better world.

Deleuze and Guattari once wrote that 'history is always written from the sedentary point of view…what is lacking is a Nomadology' (Deleuze and Guattari 1987: 23). Would a new 'nomadology' contribute to our understanding of migration and social transformation? Could it provide us with a methodological approach to break with the liberal discourse of a pliable and adaptable workforce on the one hand, and the logic of victimization that prevails in the, often, paternalistic discourse of the NGOs? While still operating at a high level of abstraction, a new 'nomadology' could provide a way out of the current dualism of the structural and victim problematics. We could, in this way, follow Papadopoulos and Tsianos for whom 'a theory of the autonomy of migration is the paradigmatic driving force of the new post-liberal sovereignty' (Papadopoulos and Tsianos 2007: 9). Migrants create new forms of social control from below, through a multiplicity of subjectivities that generate new forms of social and political action.

The 'nomadic' perspective of Deleuze and Guattari provides us with a very different way of seeing migration and social transformation. Instead of seeking to produce a mythical common ground for migrants and others, we should perhaps embrace a difference which rejects that myth, and also all forms of social classification. Thus, we do not seek to reduce difference or to enhance state control; rather we accept difference as the basis for the possibility of social transformation. It is not a question of romanticizing the figure of the nomad/migrant, but of bringing to the fore the disruptive or subversive potential of their actions. We see the value of this approach in Rosi Braidotti's feminist analysis of migration that stresses how 'the image of the "nomadic subjects" is inspired by the experience of peoples and cultures that are literally nomadic, the nomadism in question here refers to the kind of critical consciousness that resists settling into socially coded modes of thought and behaviour' (Braidotti 2011: 8). Hierarchical and heteronormative forms of classification can thus be overturned when we valorise difference and acknowledge the complexity and fluidity of social life.

Engaged research on migration and social transformation from a mobility perspective will provide us with new insights and fresh methodological approaches such as migrant protagonism (see Chapter 2 to follow). It needs to be seen as part of a broader shift in social research described by John Urry as a bid 'to develop, through appropriate metaphors, a sociology which focuses upon movement, mobility and contingent ordering, rather than upon structure and social order' (Urry 2000: 18). When we work with bounded categories such as conventional views of migrants and the various compartmentalised sub-categories they are placed in, we inevitably miss the vital moment of mobility, fluidity and contingency as the main characteristic of social relations in the 21st Century. This perspective requires a research orientation that is engaged and committed – researching with migrants and not on migrants – as well as one that relies neither on structural determinants nor victimization but, rather, prioritises agency.

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2. THE PROTAGONISM OF MIGRANTS AS AN APPROACH TO RESEARCH PRACTICE: ETHICAL AND METHODOLOGICAL DILEMMAS

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Introduction

Adopting the research 'Rebuilding life at the border' as a case study, this chapter proposes to reflect on theoretical, methodological, and ethical aspects of research practice with migrants in situations of vulnerability and social risk. The research was developed by the Scalabrinian Center for Migratory Studies (CSEM) during the years 2017-2020 and took place in Tijuana (the border between Mexico and the United States). The research is anchored in the Core Guideline of the Studies and Research Program of CSEM, entitled 'Protagonism of Migrants and Refugees'. Assuming migrants go through processes of subjectification – coercion and freedom – as argued by Mezzadra (2015), creates ethical implications for research practice. The institutional approach that highlights the protagonism of migrants goes against a strict view that considers migrants as mere victims of migratory processes. It seeks, in a particular way, to emphasize the capacity of agency (Bakewell, 1965) that migrants have, their potential to act in the contexts in which they are inserted, their resilience in facing adverse situations and their autonomy in decision-making for themselves and their families.

The Image of the Migrant

The image of the migrant contains structural ambivalences that allow us to rethink the notions of distance and proximity, attraction, and repulsion, because its definition contains a complex network of social implications and interactions. The relations of reciprocity must be understood in a context of a macroeconomy, where trade in goods is inserted, as well as the emotions, plans, goals, voices, and resistance of those who move from one place to another. Zigmunt Bauman (2009) points out that, as a fixed element of urban life, the omnipresence of

foreigners, so visible and so close, adds a remarkable dose of disquiet to the aspirations and occupations of the inhabitants. 'This presence, which can only be avoided for a very short period, is an inexhaustible source of latent anxiety and aggression and almost always demonstrated' (Bauman, 2009, p. 5, our translation).

To illustrate this, we recall some examples from the history of humanity which demonstrate the relevance of the 'Foreigner'. In ancient Greece, there was a contingent of foreigners who collaborated in the creation of the Greek cities. Besides the merchants, there were political refugees, mercenaries, diverse artists, philosophers, actors, 'vagabonds', wanderers - a heterogeneous collective that contributed to the development in the social imaginary a feeling of a common culture and an ethnic solidarity that moved beyond simple citizenship. With the movement of men in this way, circulating from city to city, a non-institutional bond is consolidated among them, creating new 'nationalities', which contributes to cultural assimilation.

Displacements are not determined simply by economic exchanges or functionality. Motivation is something transcendent: the longings for new vistas, constituting a migratory drive that stimulates the change of places and customs and seeks out new experiences of interaction. The confrontation with the outside, with the strange and the unknown is what awakens an infinity of possibilities within the migrant. Such displacements are lived intensely by those who experience them, gradually building a collective imaginary, which favors the symbolic construction of the traveler, the walker, the pilgrim. According to Zygmunt Bauman (2009), no matter what happens to a city in the course of its history, and no matter how radical the changes in its structure and appearance over the years or centuries, there is a trace that remains constant: the city is a space in which foreigners exist and move in close contact:

> The fear of the unknown – in which, even subliminally, we are involved – desperately seeks some kind of relief. The accumulated anxieties tend to unload on that category of 'outsiders' chosen to embody the

'foreignness', the unfamiliarity, the opacity of the environment in which one lives and the indeterminacy of the dangers and threats. Expelling a particular category of 'outsiders' from their homes and businesses, exorcises for some time the terrifying specter of uncertainty, burns in effigy the hideous monster of danger (Bauman, 2009, pp. 36-37, our translation).

Also, according to Bauman, the foreigner is, by definition, someone whose action is guided by intentions that, at most, one can guess, but that no one will ever know for sure.

The construction of meanings about the figure of the migrant and the modes of representation of otherness, integrate historical processes that change – from cosmopolitan foreigner to migrant as a threat to be controlled. This has important implications for reflection on theoretical and methodological perspectives in today's migratory research. The foreigner has become the great bogeyman of current nationalism, posing challenges to the analysis of migration in terms of social integration, assistance policies, access to rights etc. These challenges pose difficulties for research on the vulnerable migrant population, from the theoretical, methodological, and ethical points of view.

The CSEM Core Guideline and the 'Rebuilding Life at the Border' case study

Throughout the years 2015 to 2017, the CSEM research team held a series of methodological reflection meetings to build what has been called the Core Guideline of the Studies and Research Program (CSEM, 2018). It is an institutional and collective effort to conceptualize and define how the CSEM understands, studies, and reflects on migration. The adoption of the Core Guideline reflects aspects of the identity of the CSEM, such as its mission in the promotion and defense of the life and human dignity of migrant people in their trajectory. It also points out paths and perspectives for its performance, in both the academic and social spheres.

The Core Guideline presupposes an ethical stance in the study and research of migration and refuge, in which the subjects are

not treated simply as objects of research or as mere informants. Further to this, it aligns itself with a conceptual and theoretical basis whose production of knowledge highlights migrant people. In this sense, the key concepts adopted – protagonism, agency, autonomy, and resilience – translate into theoretical-methodological choices to recognize migrants as active and *autonomous actors* and *subjects* within the migration process, with the ability to make choices and outline strategies, to be 'agents of change' and of incidence. They also take account of characteristics of migrants, such as creativity, *resilience*, and adaptability, which enable them to perceive migration as a way to recreate daily life and rebuild their lives in the face of adversities and structural conditions that constrain them. This informed and nuanced perspective allows for a sensitive and attentive research approach to the complexity of the migratory phenomenon, by recognizing the protagonism of the migrant subjects in their interaction with the social environment (CSEM, 2018).

The objective of this chapter is to reflect on the implications that the 'protagonism of migrants and refugees' can bring to the practice of research with migrants and refugees in vulnerable situations. It is informed by the research process 'Rebuilding Life at the Border: Assistance and Attention to Migrants on the Northern Border of Mexico'[2], carried out in the years 2017-2020. As stated above, this process was anchored by the CSEM Core Guideline, whose theoretical-methodological aspects we will now explore.

The 'Rebuilding Life at the Border' research project was the first to be developed from the Core Guidelines (CG). It was the first in which concepts and categories derived from that process were deliberately adopted, with the aim of analyzing how migrants and refugees live and face situations of risk and

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[2] Original title in Spanish: *Reconstruyendo la vida en la frontera: asistencia y atención a migrantes en la Frontera Norte de México'*

uncertainty in border regions (CSEM, 2019). Field research[3] was carried out in the city of Tijuana, on the Northern border of Mexico with the United States, mainly at the Mother Assunta Institute (IMA), a shelter of the Scalabrinian Sisters for newly arrived migrant women and their children. In addition to the IMA, sixteen other institutions that provide care to migrants in vulnerable situations participated in the research. Following the field research, the data gathered was then systematized, through a process involving thematic analysis and construction of 'units of meaning' (Bardin, 1997). Following on from that research, we will now go beyond the categories of 'victim' or 'vulnerable', to analyse the trajectory of these migrants who arrive at the border as full beings, with their own protagonism.

A Framework of Agency Capacity

In this chapter we develop the framework of agency capacity (Bakewell, 1965) and focus, in particular, on the 'remaking of life', which concerns the care provided at IMA to migrants. This involves analysis of the first step in the 'rebuilding of life' project which takes place after arrival at the border. It involves placing the migrant at the centre of the decision-making process from their very arrival at the border and recognizing them as protagonists in the definition and re-elaboration of the migration project. Meanwhile, the role of the host care institutions is to respond to the needs, providing the services and information which are required at this point in the migratory trajectory (Lemus-Way, 2018, p. 65). It is a dialectical process in which migrants and support institutions interact and influence each other, safeguarding the complexity of this interaction, which is not free of contradictions and difficulties (Botega, 2020).

To exemplify this process of rebuilding life from the border, we present the case of Angelita[4], a Mexican from Oaxaca, who

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[3] To learn more about the methodology used in the research, we suggest reading Dutra, Russi and Botega (2020) *Movilidad en la frontera: Tijuana como espacio de (re)construccíon de la vida*.

[4] All names of migrants mentioned in the text are fictitious.

was deported from the United States and subsequently assisted by IMA. Angelita went to the United States at the age of 17 in search of a better life. After two attempts, she managed to enter the country and lived there undocumented, for 19 years. Working on the land, she 'made a living' and formed a family. In 2017, when accompanying her daughter to a medical consultation, she was met by police officers and arrested as she exited the medical centre. She believes that this happened because, at some time previously, she had failed to pay a fine. After spending 15 days in prison, she was taken to a migration center where she was held for eight months. She tried everything to stay in the US but eventually gave up and signed a voluntary exit agreement. She was then deported to Mexico. Severely traumatized by the prison experience and the separation from her children, she arrived at the IMA in February 2018. While at IMA, she was supported in acquiring the necessary Mexican documentation to bring her American citizen children to Tijuana. CSEM researchers accompanied Angelita to the border and witnessed her reunion with her children on Mexican soil:

> When she arrived at the shelter she was in shock and crying a lot [...]. Alongside the nervousness of waiting, she said that for some reason her family could not deliver the children in the shelter. We were prepared to accompany her to the border to meet her children, since she hadn't been to Mexico for many years and didn't feel safe. It was a short walk until we found the exit where the children and the grandmother were, next to the cousins. There were three children; the girl cried a lot. They said that in the trip the two boys vomited a lot, probably from nervousness [...] At the time of the meeting, Angelita asked us not to take pictures. It was a striking encounter between mother and children, the result of the way deportees are treated in the United States. It was striking to receive Angelita crying in the shelter days ago, because everything could have occurred in her story of deportation, out of respect we did not ask details. The reunion at the border meant a fresh start for the family,

even if it meant spending a few more days in the hostel and waiting for her husband, who she said would come for her...(Extract from the field diary, Tijuana, 2018).

After her deportation and arrival in Tijuana, Angelita did not have a very clear idea of what to do, in terms of whether she would try to cross the border again or not. She was not sure it was worth the risk. She was very afraid of being caught and having to go through again all she suffered previously. She wanted to focus on taking care of her children and making up for 'lost time'. The days she stayed in the hostel were gave her valuable time and support to reflect on what to do. Finally, she made the decision to return to her hometown and stay with her family, relying on financial support from the Institute to cover the travel costs.

Angelita's story illustrates the story of many deported women who arrive at the IMA every day - returned to Mexico suddenly and traumatically after years in the US; not knowing the country, hungry, homeless, alone and having to rebuild a life from that position. It is the story of people who have lived in profoundly vulnerable situations in the United States, due to being undocumented, whose return to Mexico, places them in an even more vulnerable, and stigmatized, condition as deportees (Albicker & Velasco, 2016). The label of deportee is often associated in people's minds with criminality and social problems, such as drug use and street living. This stigma, in turn, creates a hostile environment for deportees, often leading to their discrimination and victimization by local society, a perception of them as undesirable. This obviously affects the process of subjectivation of the migrants themselves, who see themselves as unwanted and 'without place' in the city of Tijuana.

Pedreño (2017), sees the condition of the migrant as characterized by circumstances of material and symbolic deprivation, by processes of domination and exploitation and by the dynamics of exclusion and stigmatization. However, while highlighting the ambivalent nature of the migratory phenomenon, he emphasises the subjectivity or agency capacity of 'people on the move' (Mezzadra, 2005). The concept of agency assigns to the individual actor the ability to process social

experience and determine ways of facing life, even under the most extreme forms of coercion. Within the limits of information, uncertainty, and other existing constraints (physical, normative or politico-economic), social actors seek to solve problems, learn how to intervene in the flow of social events around them and continuously monitor their own actions (CSEM, 2018).

Analytical aspects

This section focuses on the analytical aspects of the 'Rebuilding Life' research project, specifically those of vulnerability, victimization and protagonism. The CSEM Core Guideline establishes the protagonism of migrants as a fundamental ethical principle that underpins the research. Here we discuss the impact of this methodological commitment in the articulation of the categories of vulnerability and victimization, categories that are very present in studies on migration.

VULNERABILITY

The notion of vulnerability can be understood as:

> a multidimensional and multicausal situation and process in which both exposure to risk and the inability to respond and adapt of individuals, households, or communities converge. They may be injured or damaged as a result of change, or of the presence of external and/or internal situations affecting their level of well-being and the exercise of their rights (Busso, 2005, p. 16, our translation).

Migration, especially forced migration, can be the result of situations of extreme vulnerability or become themselves a causative factor in the vulnerability of people and groups. In our survey with migrants in Tijuana this perspective was confirmed, for example, in the report of people who migrated from El Salvador, aiming for a new beginning in the United States. One of the interviewees, speaking about the violence suffered in the course of her journey to Mexico, highlighted the fact that she left El Salvador to escape the violence of the 'maras'. Her condition as a poor woman, living in a peripheral region of San Salvador,

where there was a strong presence of gangs, represented for her and her teenage daughter a vulnerable situation. That sense of vulnerability was almost certainle well-founded, given her position in terms of gender, social class, education and family history. The decision to flee El Salvador came when she realized that the constant violence was hampering her ability to make a living and closing down the potential of a future for her daughter. If we consider vulnerability as this multidimensional and multicausal process affecting the lives of migrants from before they begin the migration process, it is possible to extract from it the causal elements of the migratory condition of an individual or group, and also to examine the 'assets' of individuals and groups that are part of the vulnerability process. A better understanding of assets can be useful when we ask the question of why individuals and groups, who experience similar contexts in the countries of origin, as in the case of Salvadoran migrant women, seek mobility as a survival strategy. According to Busso (2005):

> The concept of social vulnerability has the potential to contribute to the identification of individuals, households, and communities that, due to their reduced endowment of assets and diversification of strategies, are less responsive and resilient. They are thus at a social disadvantage, and exposed to higher levels of risk due to significant social, political and economic changes affecting their living conditions. However, they also have the ability to empower themselves by their own means or by external aid (Busso, 2005, p. 17, our translation).

Research with migrant groups has shown that the notion of vulnerability presents itself with its heuristic potential to unveil not only the weaknesses inherent in the migratory condition, but also the assets that enable migrants to minimise the harm experienced, and to move beyond degrading conditions. Examining and analysing the 'responsiveness' of migrants and refugees to their vulnerable status 'emphasizes the quantity, quality and diversity of resources or assets that can be mobilized

to prevent, address, or respond to a risk of social or natural origin' (Busso, 2005, p. 17, our translation). As such, the assets (physical, financial, human, social, environmental) become themselves objects of analysis as they tell us about the agency capacity of individuals which enable them to move towards the realization of a migratory project, and the difficulties and obstacles they encounter in its realization.

VICTIMIZATION

In many migrant trajectories, we see populations in mobility as being in vulnerable situations, often marked by human rights violations and discrimination, both in the transit stage and in their integration efforts in the receiving societies. Researchers must both be aware of, and take account of, all such issues when conducting research into migration and the migrant experience. The range of issues faced is vast and includes labor exploitation; extortion by civil servants; excessive bureaucracy; violence; lack of information on rights and the means to access them; difficulty in accessing regularization documentation; difficulty in accessing services and opportunities. There are also issues around the perception of migrants by host societies. This can result in discriminatory practices on the part of agencies and sectors, such as health services, welfare and the labor market. Such experiences increase the level of inequality and hinder integration, thus deepening the sense of vulnerability of these migrants.

We propose, from a migrant protagonism perspective to analyse some of the complexity of the migrant situation and the various analyses that have been deployed previously. We can extrapolate then, that those in a situation of vulnerability, are the poor, and more specifically, the third-world, migrant from the global south. The mobility of these people is then to be observed from a security bias, since they are seen as untaxed, hyposufficient and, therefore, one step away from becoming victims. The inevitability of victimization, as perceived from this perspective, places the migrant at the mercy of coyotes and traffickers, who will use their naivety to induce a false need for mobility which will, in turn, rob them of their dignity, humanity and their capacity for agency and reasoning. It is important for us

to translate the localized realities of the individual migrant and situate our analysis in a broader context that takes us beyond a narrow technical analysis.

> A detailed reading of official documents on the 'migration issue' and its 'governance' immediately identifies the use of concepts, categories, and interpretative models where the subject [the migrant] disappears, obscured by migratory flows, currents, and trends. There is, one might say, a generic 'migrant', something like a subspecies of the generic 'poor', also an object of conventions, treaties, reports, and international evaluations. This generic 'migrant' is located in a discourse trap of two categories that are, in fact, two sides of the same coin: 'criminalization of migration' and 'victimization of the migrant'(Sprandel, 2011, p. 217, our translation).

In this way, we understand that the analytical and discursive models that present the discussions of migratory governance from a securitizing bias and place crime at the centre of the debate on migration, are the same ones that produce generic categories that smooth out the complexities of the populations studied, reducing them to the role of victims. This perspective is entirely contrary to the notion of migrant protagonism as defined in the CSEM Core Guideline. The Guideline recognizes migration as an essentially human, positive phenomenon, and diversity as a wealth. It opens up a perspective that sees migrants and refugees as social actors and protagonists of their own future and it creates an understanding of how this provides meaning for their lives.

PROTAGONISM

In the case of the research, 'Rebuilding Life at the Border: Assistance and Attention to Migrants on the Northern Border of Mexico' (CSEM, 2019), the CSEM team of researchers faced a challenging situation. Mexico is considered by the migrants interviewed, especially those at the American centres, as 'el muro más grande [the largest wall]', or a 'país tapón [country cap]' (Varella, 2019 as cited in Fernandes, 2020). It is a particularly

hazardous part of the migration journey to the United States, frequently involving violence, various forms of abuse, and extortion, either by the pandillas or by agents of the Mexican state itself.

Many of these situations arise from the practice of, effectively, 'outsourcing borders', as adopted by countries in the global north. This promotes the creation of hostile spaces around their borders, precisely to prevent migrants from reaching their territories. This is the case with the United States which uses Mexico as its border, its buttress against entry into US territory. The migration mobility at the border goes against what Dias (2017) calls a transgressive movement, since the length of stay, the economic conditions of migrants and their motivation to enter the territory are issues that create territorial uncertainties and insecurities. This is used to justify the increase of control mechanisms that require the migrant to be in a constant negotiation process with border controls throughout the entire journey. This notion allows us to see how mobility can be practiced and experienced by migrant people, as individuals imbued with decision-making power.

In interviews conducted by the CSEM research team in Tijuana, as well as in observations during field research, the attitude of many migrants to discrimination was an essential element in the construction of a perspective that takes the protagonism of migrants as a starting point. Interviews showed that, in most cases, migrants do not have an objective understanding of what is 'normal treatment' in the country in which they are located and are therefore not in a position to identify themselves as victims of discrimination or as someone who is being treated differently. This only becomes apparent to them through access to support and information and/or with the passage of time.

Working within this context, the research team sought to investigate the reality not only from the recognition of the individual stories of the research's interlocutors, but mainly their own categories of analysis and their ability to handle the signs involved in the dynamics of discrimination in the sense of deconstructing, facing them, or even circumventing them,

according to their possibilities. Below is the case of a Honduran migrant, for example, who explains that she traveled in the company of a homosexual cousin but, even though she was traveling with a man, she had to masculinize several times. She also needed to claim to be lesbian to repel sexual predators along the way.

> Maribel — Hmm, and there [...] no men, there where I was, everyone, I mean everyone wanting me, but I still don't, I prefer to be told that I'm believed... and neither... to even see us. 'Cause you can't walk around like I do… you have to be objective, be pretty brave, bonehead and move on. And that's it...
> Interviewer — Badass, yes (laughs)...
> Maribel — Yeah, (laughs) Sometimes we need to pretend to be *machos*...
> Interviewer — Did that happen to you?
> Maribel — Yes, several times to be well there in Tapachula, everyone thought I was a lesbian for the same fact, for protection because too much annoyed [me]. And everything... and sometimes we ignore [them] and [they] continue to insult [me], so. Yes, on the way I always said that I'm a lesbian, for the same reason. So, they look at me and don't mess with me or anything.
> Interviewer — But they don't respect that, do they?
> Maribel — Yes, some yes, others no (Interview with a migrant. Tijuana, 2018).

It is also interesting to look at what a social worker had to say on the subject of women and their approach to safety and security:

> Interviewer — Do migrant women spend less?
> Social worker — I don't think there's less, women are more organized, okay. That is, if I am going to cross, but if I do not cross, how will I stay? With what family? With whom? […] I think the man, yes, comes more to the adventure, to see what [he] will find; the woman, yes,

comes when she already has a plan made (Interview with a social worker. Tijuana, 2018).

Finally, the Honduran migrant featured below also refers to the spirit that needs to be assumed by women in transit in Mexico:

Interviewer — Was there any other situation that treated you differently here in Mexico? By nationality, by being a woman, by any other matter?

Maribel — Oh yes, one to this path suffers from everything, right? But you have to be brave enough to overcome everything and when you bring a goal... I am that person who, when decides to do something, no one can convince me otherwise, and in spite of everything that has happened to us, yes, I have suffered enough, enough psychological, and personal things, but you cannot have to turn back, my objective is that and I will continue and if it goes well, and if not then…

Interviewer — And your goal now is to cross?

Maribel — Yes, ask for my political asylum. With the evidence I bring maybe. If not, what will be done? But I don't want to go back to Honduras, it's the truth. It's like women are more vulnerable and things happen to them, but you have to be brave enough and forget about things (Interview with migrant. Tijuana, 2018).

Final remarks

The practice of research with migrants in situations of vulnerability sometimes presents itself as challenging, not only from a methodological point of view, but from an ethical and humanitarian point of view. This is in the context of the fact that different dramas and situations of rights' violations occur on the journey up to, and at, the border and require heightened levels of sensitivity on the part of the researcher. In this sense, the research relationship is neither neutral nor emotionally distanced. Equally challenging is the need to establish epistemological surveillance, so as not to fall into discourses of common patterns and categories

that can empty and reduce the 'being migrant' to the role of victim and vulnerable.

Adopting the 'protagonism of migrants' as a Core Guideline, in addition to being an institutional ethical intention, is also a direction for research practice. The contribution of the CSEM research, with its development of analytical categories that highlight the active role of migrant subjects, is an alternative to the prevailing view of migrants as victims of structural situations and conditions. In line with the views of Mezzadra (2015), it can open up new ways to consider subjection and subjectivation and, in observing and documenting the interactions that migrants establish on the border with institutions, with other migrants and with other actors of the migration industry (Sørensen, 2017), it can identify the development of active and dynamic relationships.

In this chapter, we are not claiming that our 'Migrant Protagonism' approach can be a model for all future research in this area. Nor are we claiming that its development is definitive. Rather, what is intended is to draw attention to the experiences, livingness, and the active role of migrants in their own lives, their migratory projects and their decisions, in short, their agency capacity and protagonism. Recognizing this is the first step towards research that incorporates thinking *from* migrants. And who knows, perhaps it is one more step towards research *with* migrants, where their interpretations, potentialities and subjectivities are valued and recognized.

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3. CULTURAL SENSITIVITY AND ETHNOGRAPHIC RESEARCH WITH MIGRANTS

Rose Jaji

Introduction

Culture's mediation of the research interface has not received much attention; yet it is integral to ethnographic research. Culture shapes worldviews; yet in many instances of research with mobile populations, the tendency is to treat mobility as stripping people of their cultural backgrounds, leading to a corresponding imposition on them of a homogenizing, legalistic identity, conveyed through terms such as 'refugees' or 'migrants'. This tendency is particularly salient in research with African migrants, whose study is normatively subsumed under historical epistemological discourses that exoticize and pathologize Africa. Cultural values play an important role, not only for the researchers in their choices and paradigmatic construction of reality, knowledge, and truth, but also for the research participants who perceive their choices, mobility, and circumstances through a cultural prism. Ethnographers of the reflexive persuasion are increasingly opening the window wider into how they position themselves or are positioned by research participants in the field. However, research with migrants, who epitomize culture in motion, calls for even more articulation of the nuances of both inter-and intra-cultural research interfaces. This chapter discusses the relevance of cultural sensitivity in ethnographic research with migrants, paying particular attention to its practical and epistemological implications. It argues that culture-sensitive ethnographic research provides the researcher with a channel to restore migrants' subjectivity at a time when disaffection with the researcher's gaze is growing and potentially raising ethical questions. Migrants had other identities before they moved, and these identities constitute a core component of their subjectivities. Failure to acknowledge these identities and cultures feeds into the customary homogenization of diverse populations, whose commonalities may not involve much beyond the act of moving. It is only through the integration of

cultural sensitivity into research that ethnographers can better interpret narratives in both inter-and intra-cultural research encounters.

Communicating about, to or with Africa?

African migrants experience double pathologization emanating from the historical muting of Africa and the act of migrating. The continent has been the subject of historical exoticization at best and demonization and pathologization at worst. Classical anthropological studies on Africa provide a quintessential example of how much of the continent's encounters with the outside world have produced a homogenizing narrative that has foreign, rather than local, lifeworlds as its point of reference. Voyages to the continent whether by missionaries or anthropologists produced 'knowledge' which was devoid of Africans' own perspectives, such that African cultures were interpreted outside their own frames of reference and worldviews especially in view of anthropology's entanglement with colonialism (Smith, 2017). It was not until recently that adjectives such as primitive and savage acquired quotation marks in citations of past anthropological texts on African cultures. Most of the classical anthropological studies were not meant for African audiences and readers and, as such, what Africans thought about how they were depicted in much of precolonial and colonial ethnography was never a concern to the non-African ethnographer. Monographs of these eras muted Africans and presented them on the global arena as people without intelligible languages, who could be understood without being spoken *with,* thus resulting in publication of books that depicted the continent's peoples in Eurocentric and social Darwinist conceptions (Owusu, 1978; Thornton, 1983). In the racialized encounters between the continent and the outside ethnographers, the latter took it as their prerogative to generate conceptual tools and categories informed by their own cultural experiences, regardless of how these may have grotesquely misrepresented African worldviews. Works by Bronislaw Malinowski, Edward Evans-Pritchard, and Lucy Mair provide a significant amount of

published data on precolonial Africa, yet they contain 'notorious factual errors and other imperfections' (Owusu, 1978: 326).

The muting impact of ethnographic accounts that placed Africa at the extreme, bottom end of the racialized continuum of civilizations produced epistemic violence (Spivak, 1999) in terms of, not only how Africans were studied and spoken *about* in historical narratives couched in concepts alien to their worldviews but also of, how such narratives paved the way for its dehumanization through slavery and conquest and subjugation through colonialism. Epistemic violence is perpetrated through pernicious ignorance, which is harmful to others, particularly in terms of how it intentionally or unintentionally silences them (Dotson, 2011). Ethnographers who contributed to classical anthropology had their sights on regaling their compatriots with tales of 'uncivilized' Africans such that many monographs have the aura of the ethnographer speaking *about* Africans instead of speaking *with* Africans, notwithstanding anthropology's claim to understand 'the natives in their natural environment' and to 'grasp the *natives*' point of view, *his* relation to life, [and] to realise *his* vision of his world' (Malinowski, 1961:25; emphasis in original).

Classical ethnographic texts construct Africans as a people that engages in descriptions *sans* analysis, which justifies deployment of foreign categories and concepts; cultures that presumably lack analytical capacity can certainly not be expected to provide analytical frameworks. The outcome is the predictable idea that cultures that are different from the Western norm are deficient in that which makes cultures civilized in Western thought. It is difficult to fathom that Africa would generate adjectives such as primitive for self-reference and descriptions of African societies as 'primitive' are certainly incongruous to African thought and philosophies embodied in concepts such as *Ubuntu* and its presentation of the individual and community as inextricably intertwined. Colonialism's epistemic onslaught on Africa manifests itself in 'the devastating effect of the 'disappearing' of knowledge, where local or provincial knowledge is dismissed due to privileging alternative, often Western, epistemic practices' (Dotson, 2011: 236). Ndlovu-

Gatsheni (2021) refers to the same phenomenon as 'epistemic deafness'. Reluctance or incapacity to depart from the normative and stereotypical, results in lack of originality and production of recycled discourses and analyses, leading to epistemic injustice. The latter refers to discrimination against the individual as the knower, due to prejudices based on race, ethnicity, gender, and social background among others (Byskov, 2020).

Historical and contemporary consequences of communication *about* Africa and *to* Africa, instead of *with* Africa, clearly illustrate that ethics are not solely about physical and emotional harm, but also about cultural and intellectual strangulation, in the sense that what is produced as knowledge in contexts of non-communication *with* Africa perpetuates discourses that strip Africans of the capacity to provide concepts within, and cultural frames of references within which, their stories can be interpreted. Mutually intelligible communication involves analyzing and interpreting the content of the conversation within the speaker's own worldview. Over time, the non-critical approach to ethnographic studies on Africa have produced a mono-narrative which perpetuates the idea of an Africa that is an aberration and deficient due to its non-conformity to external standards – a situation which continues even in contemporary times.

It is difficult to tell the difference between scholarship on the one hand, and explorers, missionaries, adventurers, and media coverage of Africa on the other hand, as all of them continue to clothe Africa in a cloak of pathologized cultural singularity and exoticism. The aberration or space of exception (Agamben, 1998) that Africa continues to be to the outside world is perpetuated through foreign theories, concepts, and categories whose continued application to the continent is anomalous, in the sense of a supposedly normal lens being used to look at a presumably abnormal space, or the familiar being made relevant to the strange. In other words, exoticization of Africa has gone hand in hand with standardization and universalization of theories, concepts, and categories that are alien to the continent's diverse thoughts and philosophies, without a hint of irony and self-contradiction. The continent's worldviews are barely invoked in conversations about it, thus producing ideas in which Africa is

not understood in its own terms, but in relation to foreign but standardized, normalized, and universalized others.

Imposition on the continent of an alien linguistic repertoire that does not necessarily resonate with its diverse experiences is rarely critiqued, although some initiatives in this direction have been taken (see Owusu, 1978; Thornton, 1983). A notable example is outsiders' tendency to naturalize terms such as 'Black Africa' and 'Black Africans', without any regard to how Africans identified themselves before their encounter with outsiders bestowed on them a race and skin color as well as a tribal identity (Owusu, 1978). Trivial as such terminologies may sound, they clearly illustrate how Africans are named, not according to how they name themselves, but in terms formulated by outsiders who see them not in their own right, but in juxtaposition to others living on and outside the continent. External worldviews give primacy to race because, in their scheme of things, this is the category that legitimizes exoticization, even though the continent's peoples make sense of their world through culture rather than race. It is also in the same scheme of things that terminologies, that would require nuance when applied to Africa, are used inadvertently, deliberately or with indifference, under the assumption that the idea of 'blackness' outside the continent applies, without exception, to the continent. The problematic nature of this imported vocabulary necessitates reflection on what has been written and said about the continent for centuries, and such reflection calls for critical perspectives on scholarship on Africa and its peoples, including those who engage in intra- and inter-continental mobility. Ethnographic research with African migrants needs to take cognizance of culture, by situating African migrants' experiences within the cultural frameworks within which mobile Africans make meaning of their mobilities and circumstances. This calls for a corresponding departure from understanding migrants in relation to the immobile and sedentary as the norm, to acknowledging the need to study them not solely within, but beyond, the act of moving.

Migrants within Continental Pathologization
If Africa is viewed through a pathologizing epistemological prism, how then are its migrants viewed? In many instances, the pathologizing and exoticizing vocabulary used on Africa is superimposed on African migrants, who experience additional pathologization due to treatment of migration as an aberration. Extraction of African narratives from their cultural contexts, suppression of continental diversity, and its replacement with continental homogeneity, have all been condensed into a mono-narrative, that functions as a framework for researching and interpreting African populations. This continental mono-narrative has been, predictably, superimposed on African migrants whose diversity is equally rendered peripheral by the primacy accorded to the label migrant. African migrants experience the mono-narrative through replacement of cultural and socioeconomic diversity by a racialized essentialist migrant/refugee lifeworld, which draws sustenance from the historical pathologization of Africa and its peoples. A natural outcome of this is inference of migrants' experiences, from the stereotypical image of Africa which feeds into their representation in equally pathologizing terms (see Gatwiri & Anderson, 2021).

Although different parts of the world have generated migrants in various historical epochs and continue to do so in present times, African migrants have become the quintessence of unwanted and unwelcome mobility (de Haas, 2008; Tyszler, 2019). For example, 'refugeeness' as an essentializing term is presumably embodied by Africans who have accordingly become the yardstick by which other people's 'refugeeness', or lack thereof, is measured or determined. African migrants experience double rejection due to their combination of being African and being migrants, both of which are perceived as not conforming to the norm, and therefore undesirable. The macro narrative on Africa thus plays out in the micro narrative on the continent's migrants, in the sense that the same discourse of the continent's perceived multiple victimhoods is reproduced in discourses on its migrants. African migrants are thus studied in the framework of legal labels rather than that of how their cultural and

socioeconomic backgrounds speak to their choices and experiences.

The double pathologization emanating from the combination of being African and migrant obscures other categories of belonging that bestow subjectivity upon African migrants. For example, the migrant/refugee category renders inconspicuous class, education, and other traits that accentuate individuality, subjectivity, and diversity. Even when other categories, such as gender, are considered, neither African women nor men escape the lack of cultural sensitivity to the continent's diverse cultural constructions of gender – a topic which brings to mind the works of Amadiume (1987) and Nzegwu (1994) on gender fluidity and equality among the Igbo, and Oyewumi (2003) and Makinde (2004) on motherhood among the Yoruba, both in Nigeria. As much as Africa is characterized by ethnic, linguistic, and cultural diversity, its migrants are lumped together under the category Africans, which functions as a euphemism that conjures up the ills and sorrows of human existence. This has resulted in African migrant or refugee women's and men's culturally determined perspectives being subordinated to categories generated by this euphemism, thus reproducing the historical narrative of helplessness and hopelessness. The ethnographic lens is trained on migrants whose experiences and circumstances conform to, rather than deviate from, the pathologizing image of vulnerable femininity and desperate motherhood, gender-balanced by the figure of the African refugee man as the embodiment of the oxymoronic state of dangerous vulnerability (Jaji, 2021b).

The cultural context is often left out of African migrant/refugee women's narratives on femininity and motherhood, thus perpetuating tales of "bare life" (Agamben, 1998) and people who are 'passive subjects of their migration', thus rendering their resistance mechanisms invisible (Tyszler, 2019: 1). For migrant African men, a masculinity evocative of life in Africa as being 'nasty, brutish and short' (Hobbes, 1651) is constructed, and perpetuated through depiction of migrant African men outside the continent as a dangerous invasion (Jaji, 2021a). Even where culture is considered regarding African migrants, this is overturned by the perception of African cultures

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as androcentric, misogynistic, and the object of a priori knowledge, where femininity and motherhood morph into burdensome symbols of misery.This is far removed from African cultures that are organized around dual gender systems and gender fluidity (Amadiume, 1987; Nzegwu, 1994), and celebration of motherhood in both family and extrafamilial contexts (Makinde, 2004; Oyewumi, 2003). Similarly, the association of masculinity in relation to migrant African men with lawlessness and criminality is far removed from cultural prescriptions and restraints on the exercise of masculinity (Jaji, 2021a). In cultures where women are active in economic activities, their mobility is not a symbol of oppression, but a continuation of economic roles they have historically played. African men's quest for economic opportunities and security outside the continent is driven by cultural obligations placed on masculinity, rather than by desire to conquer and subdue. reminiscent of the continent's historical experiences with inward-bound mobilities.

Inter-cultural Interpretation

Where African cultures are acknowledged, they are often depicted in pejorative terms that portray Africans serving their cultures instead of the other way round. As much as African migrants' narratives portray people taking the initiative to improve their circumstances, these narratives are often subordinated to types of victimhood that are presumed to be natural outcomes of 'oppressive' African cultures. Meanings have a cultural context and terminologies that have universal application may have a localized interpretation. Appiah-Thompson (2017: 1) draws attention to 'some gross mistranslations and misinterpretations of oral traditions in texts' produced by anthropologist from outside Africa, due to lack of familiarity with the language and cultural idioms of the people under study.

How do cultures where a lot of resources are invested in the journey view pathologization of migration? African migrants are often represented as helpless victims who should invoke compassion and charity from others, yet their narratives portray people taking the initiative to find opportunities elsewhere when

their local environment fails to provide them. This creates the pervasive assumption that African migrants do not migrate to contribute but to benefit which feeds into anti-refugee sentiments, notwithstanding that the continent also exports highly skilled migrants (Gatwiri et al., 2021; Thomas, 2016). The situation of migration within African cultural contexts shows that it is motivated by an understanding of masculinity as requiring men to take the initiative, instead of wallowing in self-pity. It is this association of masculinity with resourcefulness that explains migration by Africans from both disadvantaged and privileged backgrounds. Regarding African women's migration, this is normally viewed in the context of poverty, without much allusion to how African cultures allow women to travel on their own and seek opportunities in spaces where they can exercise autonomy. Studying and explaining Africans' mobility within African cultural frameworks would challenge the dominant discourse which depicts African migrants as victims of, not only violent conflicts and economic malaise, but also of culture.

In what he refers to as 'gladiatory scholarship', Ndlovu-Gatsheni (2021) views gladiators as scholars who 'still claim to know it all [,] continue to listen only to themselves […] [and] are always quick to draw swords with the aim of obliterating any other way of knowing that is not in consonance with the prescriptions of the cognitive empire'. This observation requires reconstitution of scholarship in contexts of cross-cultural research as a platform for mutual curiosity, negotiated interface, and co-production of the narrative. There is also a need to acknowledge cultural familiarity, instead of conceptualizing the researcher and the researched as polar opposites, which feeds into exoticization of the familiar and mundane. In contrast to the Africans studied, and written about in earlier anthropological monographs, the Africans who feature in contemporary ethnographic studies are literate and conversant with terminologies in scholarship (see Jaji, 2018). By extension, African migrants who appear in contemporary ethnographic studies cannot continue to be treated as non-readers or non-consumers of research outputs. There is a need to revisit the assumption that what ethnographers write is intellectually inaccessible to the migrants/refugees.

Intra-cultural Dynamics

Many African scholars work within the realm of dominant narratives and epistemologies as they render their works 'globally' palatable. This means that cultural sensitivity is not only a prerequisite for ethnographers from outside the continent. For African ethnographers, use of terminologies that exoticize Africa results in internal 'Othering'. It would seem as if migrants are detached, by their very mobility, from the continent's worldviews, even within intra-continental mobility. While African feminist thought has challenged Western approaches to understanding African women, it seems this critique goes unheeded when it comes to how African migrant/refugee women are positioned, even by African scholars. Absence of self-reflexivity in African scholarship perpetuates the stereotypical narrative that the continent is not the right place for anyone to be born female. African scholarship needs to critically reflect on this banality. There is need for African scholarship to be wary of denying African migrants the very subjectivity that the continent is denied outside its borders and avoid undervaluing the mobile African as the knower.

At the same time, familiarity with African cultures comes with its own pitfalls. This can result in intellectual blindness and deafness to the nuances of culture, when interpreted through individual agency. It thus cannot be presumed that being African means that the researcher is in a better position to decipher the relevance of culture to migrants' perspectives. This is particularly salient, considering that scholarship in Africa is equally trapped in foreign tools of analysis and theories. Culture is multi-layered, which means that the insider status is fluid and shifting. The ethnographer, who is an insider by virtue of being an African, can be an outsider on the basis of nationality, ethnicity, and socioeconomic status (Jaji, 2018). Similarly, the insider, in cultural and linguistic terms, can still experience intra-cultural loss of meaning in translation in the sense of understanding the speech or words without comprehending the gist. Appiah-Thompson's (2017) observation on outsiders' misinterpretation of African idioms thus equally applies to African ethnographers.

Cultural richness renders cultures cryptic puzzles, not only to outsiders, but also to insiders, especially where the puzzle has to be interpreted in its original language, and then translated into, and explained in, a non-native language using different idioms and codes. An illustrative example is Oliver Mtukudzi, a Zimbabwean musical icon, whose Shona lyrics are understood by native Shona speakers. However, when translated into English for his non-Shona speaking fans, the meanings are often mis-interpreted, and can lead to disagreements on what exactly he's trying to convey. Many have to be content with the literal translations, which inevitably detracts from the richness of his artistic use of Shona idiomatic and euphemistic expressions. However, in interviews Mtukudzi himself (now deceased) was happy to explain his Shona songs thus: approaching migrants as the knowers who can provide real meaning to their experiences, without these experiences being forced into preconceived categories, can provide a better understanding of migration, not only as an economic and political process, but also as a cultural one.

Reconsideration of Essentialist Categories in Migration Research

It is important to understand migrants within the broader context of their pre-migration lives, as this is the best way to understand who they are beyond the migrant and refugee labels. For example, African women have a history of being politically active, significant examples being Queen Nzinga of Angola, Nana Asantewaa of the Ashanti Kingdom in Ghana and Mbuya Nehanda of Zimbabwe, to name a few. This legacy continues in many African countries, where women engage in political activities that result in persecution in countries where democratic space is restricted. These women are sometimes forced to flee their countries and become refugees. Yet, as refugees, their political agency is left out of their lives, thus reducing them to vulnerable bodies lacking agency. Depiction of refugee women as victims and depoliticization of the category, refugee women, denies women political agency (Crawley, 2021). Situating African migrants, in this case women, in their own cultural and political

contexts, shows the vast difference between how they are understood when they are viewed as helpless victims, as opposed to as political activists, advocating human rights and good governance. Culturally sensitive, ethnographic research renders visible non-essentializing categories; these shed more light on who the migrants, both female and male, really are, beyond the act of migrating or fleeing (see Jaji, 2021a). For instance, it is by seeking to understand migrants outside legalistic labels that their educational qualifications, socio-economic backgrounds, and agency become visible. This calls for a departure from analysis that frames the narrative around the desperate and undesirable, as opposed to the capable and useful.

Reconsideration of essentialist categories should be centered on how African migrants self-identify. It is important to note that, the very act of migrating or fleeing, is indicative of the resilience and hope for restoration (Jaji, 2021a). There is growing evidence showing that it is, not only the poor who move, but a cross-section of the societies from which migrants come (Gatwiri et al., 2021). The question of who these diverse people are, also points to the need for sensitivity to culture's intersection with class and education among migrants. Among them are scholars who are conversant with what is written about them, but whos voice goes unheard in how they are depicted. It is important to use categories, generated from African migrants' own narratives, instead of relying on rigid normative concepts that are increasingly becoming irrelevant to complex mobilities and motivations among migrants. This calls for prioritization of migrants' self-representation, and to this end, ethnography, and social research in general, need to provide a platform where redundant essentializing discourses and images can be contradicted. The goal of social research in this respect, would be to challenge a priori 'truths' and to ensure that African migrants do not speak without being heard, or are not heard without being understood.

Depictions of Africa as different, inevitably calls for reconsideration of theories, concepts and categories formulated outside the continent, and efforts to understand the continent on its own terms and in its own cultural milieu. Identification of

these terms and this cultural milieu entails the situation of the coding and classification of research data within the very cultural contexts in which they are produced. This would result in a shift from the use of research information to reproduce normative narratives, to its use to challenge preconceived categories. Here, the ethnographer, seeking to understand African migrants, needs to desist from the practice of extraction of cultural analysis from the 'informal logic of actual life' (Geertz, 1973: 17).

Conclusion
The broader historical narrative on Africa has implications for how African migrants are represented, and their narratives interpreted. The mono-narrative background to understanding the continent reduces research with African migrants to self-fulfilling prophesy, in the form of reproduction of unvarying stories that resonate with what has already been said about Africa and its peoples. Culture-sensitive ethnography calls for consciousness of the tendency of preconceived ideas to mask unanticipated realities unfolding during inter-cultural research encounters. The challenges of conducting ethnographic research with African migrants are not just confined to inter-cultural interfaces. They extend to intra-cultural research in which the ethnographer may be limited by the use of tools and theories provided by externally formulated dominant paradigms and epistemologies. While inter-cultural ethnography calls for wariness of exoticization of the unfamiliar, intra-cultural ethnography calls for caution against familiarity, which can mask the unanticipated and poignant in such research encounters. In both instances, it is important to always be aware of the centrality of the ethnographer's positionality, and its methodological and epistemological implications in research with African migrants whose mobility does not necessarily imply detachment from their cultural frames of reference. Ethnography already provides the advantage of speaking to those who are often marginalized in knowledge production, and it is important for it to apply this methodological advantage to good use through outputs that are reflective of the 'natives' natural environment', not in the physical but, in the cultural sense of the phrase.

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4. WHAT SOLIDARITY IN RESEARCH? MIGRATION, PRECARITY AND SOCIAL MOVEMENTS

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A 'new epistemic community'

From the background of a long-term personal research experience, in this chapter we discuss conditionality for a critical positioning of academic knowledge production in solidarity with migrant driven social movements. This concerns a continuous exploration, in dialogue with movement intellectuals, of the relation between theory and practice, leading to exfoliation of applied notions and analytical instruments.

It relates to the production of alternative knowledge with those conventionally excluded from the canon of a dominant 'northern epistemology' (de Sousa Santos, 2016), through which 'knowledge from the ground up', rooted in migrant communities and organisations, has been systematically marginalised (Choudry & Kapoor, 2010). From this perspective we see the Migration and Social Transformation Network (MSTN) as a collective endeavour, talking the language of, what De Genova, Mezzadra and Pickles, (2015) define as, 'a new epistemic community'. By this, they understand cross-sectioned networks of migrants, activists and scholars, emerging across the world, attempting to go beyond the established paradigms of both traditional and critical migration studies. It calls, by implication, for taking the perspective of the 'global south', as delineated by de Sousa Santos (2016), encompassing redemptive knowledge production for social transformation in our present, with global migration as a dynamic force. Santos argues that global migration has shaped, or reinforced, intersecting epistemological configurations of the South in the North and the North in the South. From this perspective, Santos' notion of an 'epistemic of the South' signifies a move to shift the focus from territorial borders, onto an understanding of the global South as a metaphor 'for the systematic and unjust human suffering caused by global capitalism and colonialism' (de Sousa Santos, 2016: 134; cf.

Morrice, 2019: 22-23), encompassing subaltern populations in the geographical 'north' as well as the 'south'.

Departing from these presuppositions, we set out to discuss options for developing knowledge for social transformation in solidarity with migrant driven movements. We do it from the background of our long-term critical study of a network based global civil society (CS) coalition, People's Global Action on Migration, Development and Human Rights (PGA). from the position of 'migrant rights as human rights', we question the alienation of most of the world's migrants from essential civic, political, economic, labour and social rights. Discussing internal and external obstacles for solidarity as 'transformative practice' (cf. Featherstone 2012) we reflect, in conclusion, on the positionality of research in solidarity with social movements. Upon summarising our experience of companionship with the PGA, we reflect on a critical approachin research that bridges the position of a detached academic objectivism and a solidaristic activism.

The enigma of 'the last utopia'

Inspired by Featherstone (2012: 5) we understand solidarity as a transformative practice; 'a relation forged through political struggle which seeks to challenge forms of oppression'. It is a relational practice, generative of political subjectivities, collective identities and alliance-building among diverse actors. It is inventive of new imaginaries and linked in different ways to institutions (Agustín and Jørgensen, 2019a). Thus conceived, solidarity as transformative practice poses the problem of how to imagine, theorise and operationalise collective political identity and agency 'that might lead to the creation of new, ethical and democratic political institutions and forms of practice' (Gill, 2000: 137). It has led to a focus on 'civil society' as the 'last holdout' against the 'economic tsunami' of neoliberal globalisation (Burawoy, 2006: 356), for politics of 'emancipation' (Fraser, 2013) and transversal solidarity beyond ethnic divides and national borders.

Along these lines, a visionary conception of transformative solidarity, embedded in a global civil society, has been modelled

by Hosseini, Gills and Goodman (2016) in terms of a 'transversal cosmopolitanism', … creating a common ground … for progressive hybridization, and active political cooperation among diverse identities and ideological visions … against existing capitalist social relations and structures of domination'. It is a perspective that speaks to the conception of so-called 'new-new' globalised social movements, with a composite social basis, and organised around informal networks, linking locally rooted activism to global events (Feixa, Pereira & Juris, 2009). Faixa et al observe that they are like the neoliberal system they oppose, situated in a globally networked space: that is, phrased in neo-Gramscian terms, global network-based mobilisation of 'counter-hegemonic movements' (Purcell 2009; Miraftab 2009).

A cardinal case with affinity to these conceptualisations of contemporary hybrid movements is the World Social Forum on Migrations (WSFM), founded in São Paulo as a key feature of the World Social Forum (WSF) and holding its first global summit in Porto Alegre in 2006. Another, related, network born out of the alter-globalisation movement is the People's Global Action for Migration, Development and Human rights (PGA). The PGA was shaped explicitly as a global event and contestative CS counterpoint, designed to intervene in, and impact on, the annual intergovernmental meetings of the Global Forum on Migration and Development (GFMD), from its first summit in Brussels in 2007. In its annual events since then, parallel to and intervening in recurrent intergovernmental fora, the PGA has summoned a multitude of organisations of civil society (CSOs) and critical intellectuals from across the globe, with a heavy tilt towards the global South. It has endeavoured to amalgamate a diversity of subject positions of diaspora movements and migrant advocacy organisations, faith-based and humanitarian CSOs with those of old as well as new moral-political and organisational trade union orientations (Ålund & Schierup 2018). It has served to critically invigorate networks and CSOs of different scale (local, national, regional and global), and spawned new institutional upshots, concerned with migrant livelihoods, rights and agency.

We first joined the WSFM/PGA process in 2010 on the fifth global meeting of the PGA, held in Mexico City that year. We

gathered close to one thousand CS delegates from across the world. The preamble of the summit's declaration sounded a powerful dictum echoing Karl Polanyi's legendary work on The Great Transformation: 'We are human beings with rights to mobility, freedom of speech, decent work and social protection – not a commodity' (PGA 2010). This appeal was addressed to the so-called 'Common Space', a slot reserved for dialogue between civil society, governments, and international organisations and inserted into the wider agenda for yearly summits of the governmental Global Forum for Migration and Development.

The International Working Group, responsible for organising that PGA event in Mexico City, had the ambition to build a transversal movement that would boost labour, social, civic, and human rights for migrants, and redress asymmetric power relations in migration governance in favour of the global South. In effect, the event came genuinely up to the exigency of developing critical counter-knowledge, contesting the agenda on migration management by states and international organisations, and increasing the capacity to provide alternatives that may cast doubt on hegemonic ideopolitical schemes and dominant institutional practices. A series of advanced workshops and thematic position papers gave credence to the growing capacity of contending popular movements to develop 'theoretical knowledge based on a systematisation of their political experiences' (paraphrasing Motta 2011: 179).

The PGA's disposition, as an offspring of the alter-globalisation movement, came to expression in the meeting's focus on redressing ground courses of migration and the precarious state of migrants, and on unravelling causes and consequences of unequal development structured by an asymmetric trade and financial system, bolstering the control and power of the North. It critically confronted the undermining of human rights by corporate globalisation. The declaration stressed: the exigency of a broad human rights centred approach to migration and development based on inter- and intra-regional reciprocity; 'human security' as a counterpoint to the perceived dominant national security framing of migration and to the exclusion and criminalization of migrants; non-discrimination

and decent labour standards for all, including irregular migrants; and the ratification and follow up of core UN contentions and ILO instruments on the rights of migrants

The PGA served as an auspicious arena for the crafting of a transformative transversal solidarity. It facilitated engagement by a wide span of civil society and advocacy organisations; a valuable interchange in knowledge production, involving activists from most of the world's regions; and critical academic research[5]. However, a report by Likić-Brborić & Schierup (2012 [2010]) presented to the PGA meeting in Mexico City, also foresaw immense obstructions to radical change coming about. It pertains to institutional changes in the international governance regime, in terms of a neoliberal landslide towards the primacy of private property rights paralleled by the transmogrification of the philosophy of 'human rights' from a contestative 'last utopia' of universal social justice, based on unconditional civil, political, economic, labour and social rights (United_Nations 1915 [1948]), into a universally shared, but non-obligating, floating signifier, paid lip service to by all (Schierup & Ålund 2012; Schierup et.al. 2015; Moyn 2010). Intersecting with these changes in the global governance regime, we could also discern upcoming cracks in the civil society alliance that held up the PGA as a contestative civil society forum, in pace with the network's incremental incorporation into spaces for dialogue and 'partnership', related to intergovernmental fora and a changing UN institutional framework.

Likić-Brborić & Schierup (2012 [2010]: 23) projected then, in the mentioned report, commissioned by the organisers of the Mexico City PGA, two basic scenarios and venues of action: (One of empowerment of the 'precariat', understood as a disposable

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[5] An influential actor in organizing the Mexico City PGA event in 2010 was the International Network on Migration and Development (INMD: http://rimd.reduaz.mx/indexIng.html), a global network of researchers, academic institutions and migrant organizations promoting critical research on development, international migration and human rights.

labour force without basic rights and security; and the other concerned with governance of the production value chain, with the focus on the interests and agency of multilateral agencies, TNCs and states. Concerning the first scenario, we saw a looming divide between trade unions and NGOs, with the former committed to the ILO's Decent Work Agenda and the latter supporting a more generalised conception of 'human rights'. As members of an international research consortium, we were involved in subsequent participatory research, following up the PGA and the WSFM. While engaged in this research, we were also actively participating in associated organisations and networks. This allowed us to record both the unfolding, and the consequences, of these inherent tensions in composite social movements, exposing deepening cleavages in the global governance framework (Schierup et.al. 2019).

Vicissitudes of transversal solidarity

We conceptualised and analysed (Ålund & Schierup 2019) a tendential split in the networked coalition of the PGA, in terms of 'transversal politics' (Yuval-Davis 1999), implicating dialogue between disparate actors on equitable terms in the formation of composite social solidarities and movements. It speaks to the original Gramscian idea that, confronted with a fragmented socio-political field, a social movement needs to 'widen itself … propagating itself throughout society… broadening its political identity' through incorporating a wider array of ideopolitical perspectives in the formation of a contestative transversal solidarity (Purcell 2009: 295-96). We operationalise this focus by use of the concept of networks of equivalence, understood as broad coalitions fusing 'many different struggles, movements, and groups' (Purcell 2009: 279). In this process, argues Purcell, a complex relation between sameness and difference is played out. With reference to Gramsci (1971) and to Laclau and Mouffe (1985), he elaborates the dual notions of articulation and equivalence, in order to 'capture how groups join in forming a counter-hegemonic formation', construct a shared common sense, and establish a collective articulation of a new political will

'without dissolving differences into a homogenous unity' (Purcell 2009: 303).

As indicated above, the transversal nexus between migrant organisations and advocacy organisations, on the one hand, and trade unions, federations, and confederations, on the other, is essential for building corporeal power and strategic capacity of counterhegemonic movements (Piper & Grugel 2015). But it is also a potentially fragile link, due to major differences in target groups, management style, overall ideopolitical orientation, conception of human rights and labour, as well as time horizons and preparedness to engage collectively in politics related to precarious labour and livelihoods. A strengthened impact of civil society on the global governance of migration will, Piper and Grugel (2015) argue, depend on a catalytic fusion of ideological horizons. Trade unions organise collective representation, confronting corporations and the state with often long-term political horizons, but they tend not to be involved with the informal economy and the most precarious workers. NGO programmes, on the other hand, tend to be more concerned with extreme poverty and the informal sector but are less focused on labour rights as such. They tend to be project based, depending on governmental or corporate funding, with shorter action horizons, and adopting with a 'watchdog role' (cf. Schierup et al. 2015). In the case of the PGA, this critical divide was heightened by other tensions between those involved networks and coalitions who adhered to the original PGA agenda, and others who were submissive to a neoliberal landslide in the dominant global governance regime (Schierup, Delgado Wise & Ålund forthcoming 2022).

This brings us to our second analytical focus, which pertains to challenges faced by movements in a subordinated position within formalised intergovernmental and supranational policy spaces. It sets out to explore the issue of global governance of migration in the broader context of a wavering neoliberal hegemony (Cox 1983; Deak 2005), entangled in contradictions and legitimacy problems, and facing challenges by compound movements of civil society. This enigma has been framed in terms of the confrontation of social movements with the conditionality

of invited spaces, a term theorised by, among others, Cornwall (2002), Gaventa (2006) and Miraftab (2009). It relates to solicitation for civil society participation or consultation, and thereby 'co-responsibility' (e.g., Oelgemöller & Allinson 2020), at different levels of governance. Creating new institutional arrangements will not, by itself, lead to profound policy change, contends Gaventa (2006: 23). It depends on the character of power relations, in which new, potentially more democratic, spaces are embedded. When a rhetoric of 'partnership' or 'participation' is used by powerful intergovernmental organisations for the purpose of inviting 'engagement on a "level playing field" [this] obscures inequalities of resources and power', and it blurs 'distinctions between economic power holders and those who might negatively be affected by their corporate practices' (Gaventa 2006: 23). It entails an ubiquitous 'disciplining of dissent' (Choudry & Shragge 2011), entailing professionalization, and collaboration with, and recognition from, states and hegemonic institutions of governance, phrased in terms of 'dialogue' and 'partnership'.

Relating to the issue of migration governance, some migrant and migrant advocacy CSOs have manifestly followed a course of criticism from the 'outside' (Rother 2013), emphasising a distancing from what they consider a depoliticizing 'NGOism' and forces of co-optation ensuing from participation in invited spaces designed for 'dialogue' with governments, international organisations and business. Others have, however, followed a course of active participation. The PGA is a typical example of this alternative tactic. It actively participaties in consultations and dialogue within invited spaces, monitored by national, regional, and global institutional stakeholders. While attempting to develop and promote a contestative platform, it has followed a tactic of 'war of position'[6], acting within, being subordinate to, but also challenging, hegemonic objectives of dominant international migration narratives. However, it has also been forced to maneuver in a complex and changing field of asymmetrical global

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[6] Notion coined by Gramsci (1971)

power geometrics, relating to the globalisation of migration governance.

The neoliberal surge: Marginalisation, co-option, and pleas for a realisable utopia

Taking stock of this, critical studies have been concerned with major institutional changes, (Rother 2020; Pécoud 2020a, 2018; Likić-Brborić 2018; Likić-Brborić & Schierup 2015; Geiger & Pécoud 2013) demarcated by opposing positions in struggles for the formation of a hegemonic, UN backed, ideo-political framework on migration governance (Georgi 2010)[7].

One major positional framing is the rights-based approach, with its focus on binding conventions on rights to mobility and global citizenship (in terms of civil, political, social, and labour rights), including the right not to migrate, related to development through 'fair globalisation' (ILO 2005). This has privileged rights of workers, including labour migrants and refugees, over interests in technocratic schemes for a global 'management of migration'. It corresponds to the original platform of a contestative global civil society, as manifested by the PGA, for example, and originally supported by major international institutions in the UN framework, with the ILO as central protagonist. The strong presence of the ILO, with its insistence on unconditional labour rights as migrants' rights (see Likić-Brborić & Schierup 2015), was pivotal to the support of this approach by the international trade union movement.

The rights-based framing is counterposed by a neo-liberal approach, driven by a GATT-WTO policy agenda. It favours a binding treaty-based, supra-national regime, embedded in a firm framework of, so-called, 'migration management'. It propagates a business friendly, regulated openness, with respect to useful migration of the economically desirable and the politically

[7] Piper (forthcoming) offers a detailed examination of the changing impact and role of the ILO in global migration governance, and Ahouga (forthcoming) on the role and impact of the IOM.

acceptable, coupled with restrictive border controls and effective deportation systems. Its prime advocate in the international system is the IOM; an organisation nursing an image of 'Managing Migration for the Benefit of All' (IOM 2021; Rother 2020: 10), but which has been criticized for its top-down technocratic approach to migration and its shallow conception of migrants' rights and agency (Rother 2020; Pécoud 2018; Delgado Wise 2018; Geiger & Pécoud 2010, 2013).

The Global Compact on Migration, the first over-arching UN backed charter of global migration governance, was hammered out at a global inter-governmental summit in 2018 (see, e.g., Schierup, Delgado Wise & Ålund forthcoming 2022). Here the neo-liberal approach came out victorious, albeit with recognition of the continued centrality of the power of nation-states' in determining entry, stay and removal of non-citizens, and of their opposition to any binding international or global framework. It also paid a ritual homage to a hazy conception of 'human rights' to appease civil society and with regard to the exigency of procuring broad legitimacy through hegemonic consensus management. However, it pushed fundamental UN declaration covenants on universal civic, social, and labour rights offstage (Schierup, Delgado Wise & Ålund forthcoming 2022). With the ILO downgraded to an increasingly inferior position in the UN system (Piper forthcoming 2021), and with the labour unions tendentially derailed, the rights-based approach has been relegated. By contrast, The IOM position has gained traction and support in knitting a wavering hybrid hegemony together (Pécoud 2020b). It has displayed remarkable energy and skill in co-opting influential leaders of civic networks, originally on the forefront in the battle for the rights of the world's victims of forced migration, many of whom have now made good careers and obtained privileged positions[8] through a skilful

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[8] Including, for example, the international Steering *Committee* for the Civil Society Days of the *GFMD*, IOM, ILO, the ICMC, the Civil Society Action Committee, the United Nations Network on Migration, the Women in Migration Network

manoeuvring across a complex institutional web of the new hybrid hegemony (Rother 2020).

Apologists may present this as the continuation of a counter-hegemonic 'war of position' under novel structural-institutional conditions, but an alternative view is as fragmenting processes of co-optation and depoliticization, threatening to 'unmake' a counter-hegemonic movement (Ålund & Schierup 2019). Not surprisingly, the confirmation of the new hegemony has provoked bitter criticism. This pertains, not least to the international trade unions voicing grievances concerning the negligence of fundamental UN declarations on migrants' civic, political, and labour rights in the formation of the new global hegemony (e.g., ITUC 2018). A critique came also from sessions of WSFM, urging for the revival of, and solidarity with, localised movements from the ground up. Criticims also came from several engaged migrant rights platforms, affiliated with the PGA, and institutionalised CS spaces from within an emergent governance regime on migration, formed during extended struggles for migrant rights (further in, Schierup, Delgado Wise & Ålund forthcoming 2022).

Reflexions on the conditionality of 'solidarity'
In the following section, we present some concluding reflexions on the conditionality of 'solidarity', providing a wider context to the case that we have presented herein.

First, options for research in solidarity with migrants will vary, depending on ideo-political orientation and social grounding of the activism or movements in question. On one end of a continuum, we encounter a wide variety of migrant agencies conforming to, what Chatterjee (2002) terms, 'a politics of the governed'; Holston (2009) an 'insurgent citizenship' of the everyday; or Bayat (1997) the outlawed 'everyday resistance' of a precarious 'uncivil society'. This implies, as formulated by Bayat 'a quiet encroachment of the ordinary'. It represents a fleeting and atomised struggle without clear leadership, ideology, or structured organisation, yet marked by resilience and long-term mobilisation that may initiate 'molecular' changes and progressively modify prevalent relations of power. Thus, a

myriad of seemingly uncoordinated 'acts of citizenship' (Isin 2009), may bear seeds for systemic change (Balibar 2010). One example that may be of particular interest to the MST is, what Landau and Freemantle (Forthcoming [2022]) refer to, as 'tactical cosmopolitanism'. This in their a study of heterogenous practices in migrant struggles, emerging from the harshness of livelihoods and hostile xenophobic attitudes in the cities of Johannesburg and Nairobi. This is not, as such, a counter-hegemonic movement that 'seeks to articulate an alternative order' but rather a 'motley collection of actions, undertaken by groups that are often fragmented by language, religion, legal status, and mutual enmity' (Landau & Freemantle Forthcoming [2022]).

On the other end of the continuum, we encounter organisations, networks, alliances, and composite migrant driven political platforms, flying counterhegemonic ideopolitical charters, formulated and articulated by seasoned 'organic intellectuals', and with a keen sense of historical heritage and institutional-structural conditionality, framing opportunities for social transformation (e.g., Milkman 2006). They may traverse the institutions of nations, regions, intergovernmental fora, and international organisations, and they may occupy legitimate positions within them. Thus, they may wage a 'war of position' (see above) within the institutional intestines of a dominant hegemony. They may be of various scales, active on a local, national, regional, or global level, and highly variable with regard to both legitimate status and impact. But even small and locally rooted networks and organisations may be represented by experienced organic intellectuals and, given the accessibility of electronic sources and social media, they may be able to reach out to, or shape, wider networks on a global scale.

Second, it is essential to relate to the notion and actual meaning of 'solidarity', from both a philosophical perspective, and from its premises in terms of social practice (e.g., Bauder 2020). A seminal contribution to the discussion of the latter, solidarity as transformative practice, is that of Haiven and Khasnabish (2014) in their book on radical imagination and social movement research in times of austerity. Here they scrutinise potentials, weaknesses, and pitfalls of three different approaches

to solidarity. The first is an invocational approach, through which academics, based on a conventional research methodology, may use their privileged position to depict movements in a positive light and to legitimise their claims. The second, the avocational approach, sees researchers subject themselves to the objectives of movements and, even, fully merge with them, thus retreating from the privilege of the academic position. In the third, the convocational approach, the movement is seen as a producer of knowledge by itself. Here the role of the researcher may be to support the movements' own capacity for analysis, for example through creating inventive spaces for dialogue and critical reflection. While respecting social movements as sites for knowledge production, this cannot, however, rest on an unbounded solidarity. Haiven and Khasnabish argue, that it needs to recognise and respect the social location, privilege, constraints, and power of academia, and through this to continue, on the basis of reflexive encounters with movements, contributing to critical scholarly dialogue and theory formation. Our general approach to 'solidarity' largely speaks to this third perspective.

The globalised movement for migrant rights that we have discussed in this chapter, belongs to the upper end of the continuum of migrant agency that we have referred to above. We saw, in the context, dialogue with politically articulated, analytically sharp, and organisationally adept organic movement intellectuals as a priority, given their pivotal role in moulding new transversal political subjectivities and collective agency, in pursuit of democratic political institutions and forms of practice. We proceeded, in collaboration with our international academic team, to actively setting up fora for dialogue between scholars and movement activists[9]. This involved a reflexive approach, founded upon 'substantive rationality', as theorized by Burawoy

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[9] Organising several workshops and conferences staging dialogue between CSOs and academia, sponsored among others by MOST-UNESCO (Management of Social Transformation).

(2009 [1998]: 68), enjoining what is conventionally separated in mainstream social research: 'participant and observer, knowledge and social situation, situation and its field of location' (2009 [1998]: 68). It confirms a methodological principle that intervention should be an integrated part of social research. It may help to bring contradictions and social cleavages into the open through provocation of what may have become a depoliticized common sense in a movement.

Through our long-term research commitment to this approach, a necessarily conditioned quality of 'solidarity' came to stand out, and more so as a prospective movement for migrant rights disclosed itself as a field of struggle, harbouring a heterogeneity of perceptions and strategies. These were differently positioned in relation to the structuration of power in the overall global ideopolitical struggle for hegemony, that we have discussed previously in the chapter. The issue of 'solidarity' with 'the migrant' was, in consequence, put sidelined, especially as confronted with processes of co-option and de-radicalisation of the movement, as discussed above with reference to the Global Compact on Migration. This in turn led us to explore and initiate a closer dialogue with critically positioned migrant led CSOs, and to realise that engaged social research is part of the self-same field of struggles as the movement that it studies, and therefore it is obliged to position itself within it.

One such critical initiative for a revival of transformative solidarity is manifested by a call for an alternative Global Pact of Solidarity for the Rights of Migrants and Refugee Peoples. We have entered a dialogue with this initiative, among others, inviting their critical intervention in our continued research. Following the UN declaration of the Global Compact on Migration, the Global Pact was initiated by the Transnational Migrant Platform-Europe (long standing member of the PGA and associated institutions) and generated by the Permanent Peoples Tribunal. It is imagined to be built 'from the ground up' by social movements and organisations and aspiring towards an

equivalence of struggles linking a multitude of disenfranchised[10]. It involves an urgent plea for a, still, 'realizable utopia'[11] in a crisis ridden 21st century, which relocates migrants and refugees as subject of rights at centre stage of a sustainable future. Consequently, this continuous reinvention of a radical agenda within movements for migrant rights directs a plea to academia for continuously scrutinising our commitment to solidarity, being confronted by a complex field of struggle subjected to wavering hegemonic frameworks and a related plurality of positions, voices, and claims.

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[10] Further information available at: https://ppt.transnational migrantplatform.net/sign-on-to-global-pact-on-solidarity/

[11] The notion of 'realizable utopia' was coined by Lambert (2010).

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5. THE MIGRATION-DEVELOPMENT NEXUS REVISITED

Raúl Delgado Wise

The main purpose of this chapter is to critically address several key dimensions of the dialectical relationship between migration and development, with special emphasis on deconstructing the dominant, or hegemonic, discourse in the field. This implies: (a) offering a comprehensive vision of that relationship, with particular emphasis on the conceptual architecture of, what is referred to as, a counterhegemonic or southern perspective; (b) identifying several key demystifying indicators in reference to the world's largest migration corridor, Mexico-US; and (c) briefly assessing the efforts to build a global migration governance regime and the challenges propelled by the current epochal crisis faced by humanity, particularly in times of COVID-19.

The Theoretical Battlefront

In the realm of the current form of capitalism, neoliberal globalisation, the debate on migration and development has been dominated by the sacrosanct belief that migration contributes to development of the country of origin. This view — promoted by the World Bank in line with the implementation of neoliberal policies — posits that remittances sent by international migrants have a positive effect on development within countries and regions of origin. Embedded in neoclassical and monetarist economic theories, this approach conceives of migration as an independent variable, and the link between migration and development is viewed as a unidirectional relationship, in which remittances serve as a key source of development for countries of origin. This optimistic assessment portrays the global market as the culmination of capitalist modernity, and the end point of an inevitable process that has no reasonable alternative. Social concerns associated with development are overlooked or ignored, as it is assumed that a 'free' global market — disregarding the extreme concentration and centralisation of capital in a handful of large multinational corporations that control and regulate that

market in contemporary capitalism — will operate as an inexhaustible source of economic growth and social wellbeing.

Several underlying — and misleading — propositions are at the core of this perspective:

1. Remittances are an *instrument* for development: In the absence of effective development policies in less developed, migrant-sending nations, the migrants themselves become agents and catalysts for development in places of origin. Remittances serve as the primary tool.

2. Financial instruments should be *democratised*: Massive remittance flows across the globe produce an attractive market for financial enterprises offering banking services to marginalised groups. Remittance-based savings and credit are viewed as an attractive platform for development under microfinance schemes.

3. *The poor have economic power*: Remittances provide migrants, and their dependents, with access to resources that can bring them out of poverty, transforming them into agents of global capitalist development.

Ultimately, this view, supported by the main principles and postulates of the neoliberal school of thought, is conceptually limited. It ignores the historical and political context of contemporary capitalism and fails to consider critical aspects of the relationship between migration and development. It disregards the root causes of migration, ignores the human rights of migrants, downplays the contributions of migrants to receiving societies, and overlooks the risks and adversities they face in countries of transit. This approach encompasses an optimistic view that fails to address the meagre —and often unbearable— living and working conditions experienced by migrants in receiving societies, and the high socioeconomic costs that migration imposes on sending countries. It also fails to appreciate any potential connection between internal and international migration.

This perspective has also been referred to as *migration management* (Geiger & Pécoud, 2010). In fact,

> [t]hrough the umbrella of an apparently "neutral" notion ...new narratives have been promoted. These narratives attempt to depoliticise migration, obfuscate the existence of divergent interests or asymmetries of power and conflicts, avoid obligations imposed by international law, and promote the idea that managing migration can be beneficial for all stakeholders: countries of destination, countries of origin, the migrants themselves and their families. This unrealistic triple win scenario clearly favours the interests of the migrant-receiving countries and the large multinational corporations based in such countries (Delgado Wise, Márquez & Puentes, 2013: 433–34).

This dominant, or hegemonic view, engenders contrasting views of migrants. In countries of origin, they are portrayed as national heroes with the political purpose of ensuring the flow of remittances; in transit and destination countries, they are characterised as a burden and, more often, as a negative and polluting cultural and racial influence. The underlying purpose of this stigmatisation is to guarantee the supply of cheap and disposable labour.

Moreover, under this guise, international migration has been analysed in destination countries in a decontextualised manner, through an ethnocentric and individualistic stance, that entails an incomplete understanding of the complex and multidimensional nexus between migration and development. It has promoted a kind of methodological imperialism, with a nativist focus on salary disparities, the displacement of native workers, illegality, and border security. This vision not only distorts reality, but also obscures the underlying causes of migration and development-related problems that are intrinsic to neoliberal globalisation. In a nutshell, through this lens '… remittances have become a new "development mantra": The belief that remittances can be channelled into economic investments that will overcome

underdevelopment. Or to put it less positively, the idea is that some of the most exploited workers in the world can make up for the failure of mainstream development policies' (Castles & Delgado Wise, 2008: 7).

A Counterhegemonic or Southern Perspective
In contrast to the dominant view, an alternative counterhegemonic approach to conceptualising the relationship between migration and development, rooted on the Latin American critical development school of thought, has been brought into the debate. This school of thought has left an indelible mark on the field of development studies:

> ECLAC's[12] structural school introduced a fundamental paradigmatic shift in the field. For the first time, the theory and practice of development was analysed from a Southern perspective. This paradigmatic turn did not merely imply a negation of the North, but a negation of the negation in dialectical terms: a search for a more systematic analysis of the dynamics of development and underdevelopment, and for a more equitable form of development or post-development. With the advent of the dependency school, an emancipatory angle was incorporated into the debate: the necessity to transcend the limits of capitalism (Veltmeyer & Delgado Wise, 2018: 347–348).

This perspective, also referred to as a *southern perspective*, was incorporated into the field of migration and development studies in an attempt to build a comprehensive, inclusive, emancipatory, and libertarian approach to the nexus between migration and development (Delgado Wise, 2014).

This alternative perspective is based on a deep understanding of the nature and contrasting characteristics of neoliberal

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[12] United Nations Economic Commission for Latin America and the Caribbean

globalisation along the North-South divide, and between social classes. From this analytical prism, the nexus between migration and development is characterised as a dialectical, rather than a unidirectional, relationship and approached from a multidimensional framework, that encompasses economic, political, social, environmental, cultural, racial, ethnic, gender, geographical, and demographic factors (Castles & Delgado Wise, 2008).

While the dominant or hegemonic perspective only focuses on the horizontal axis of Figure 1 (below), from a decontextualised, ahistorical, reductionist and unilateral standpoint, the alternative/counterhegemonic perspective attempts to cover the whole spectrum of dialectical relationships. It also considers the ample spectrum of impacts along countries of origin, transit and destination, and incorporates, as a key analytical dimension, the vertical axis. This axis —intentionally hidden by the dominant/conservative standpoint— incorporates two fundamental dimensions: (i) an analysis of the multiple violations of human and labour rights suffered by the migrants themselves and their families in origin, transit, and destination countries; and (ii) the root causes of the complex relationships between migration and development under neoliberal globalisation.

Figure 1. The Counterhegemonic Perspective: Key analytical dimensions
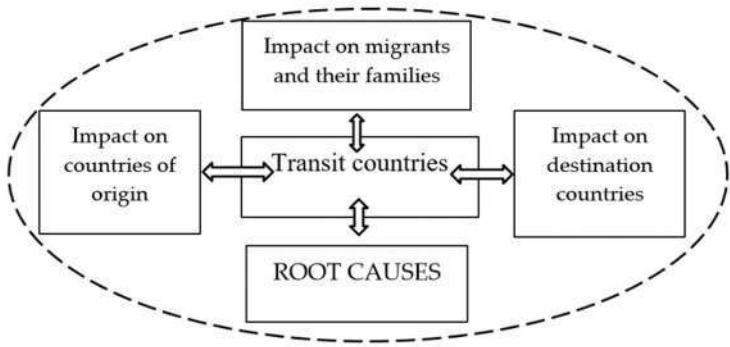
Neoliberal Globalisation
Source: Author's creation.

A major and inescapable feature of the current form of capitalism and neoliberal globalisation is *uneven development*. The global and national dynamics of capitalist development, the international division of labour, the imperialist system of international power relations, the conflicts that surround the capital-labour relation and the dynamics of extractive capital have made economic, social, political, and cultural polarisation more extreme between geographical spaces and social classes than ever before in human history. A conspicuous output of this scenario is the outrageous concentration of capital, power, and wealth in the hands of a small elite within the capitalist class. Nowadays, the richest one percent of the world's population controls 40 percent of total global assets (Davies, et.al., 2008).

A conspicuous outcome of this scenario is the disproportionate concentration and centralisation of capital, power, and wealth in the hands of a small cluster of large multinational corporations. In the expansion of their activities, these corporations have created a global network and a process of production, finance, distribution, and investment that has allowed them to seize strategic and profitable segments of peripheral economies, and appropriate the economic surplus produced at enormous social and environmental costs. This strategic shift has entailed, what has been described as, the new 'nomadism' in the global production system, including commercial and services endeavours, that are supported by the enormous wage differentials that exist, and are reproduced along the North-South divide — the so-called global labour arbitrage (Foster et al., 2011a: 18). This, in turn, has led to a reconfiguration of global value chains, or more precisely, global networks of monopoly capital (Delgado Wise, 2021), through the establishment of export platforms that operate as enclave economies in peripheral countries. The resulting strategic shift in the organisation of industrial production has been spectacular: 'The top one hundred global corporations had shifted their production more decisively to their foreign affiliates [mainly in the South], which now account for close to 60 percent of their total assets and employment and more than 60 percent of their global sales' (UNCTAD, 2010). In a similar vein, it is estimated that, in

the periphery, around 100 million workers are directly employed in assembly plants, established in more than 5,400 processing zones, that operate in at least 147 countries (UNCTAD, 2020). This significantly transformed the global geography of production, to such an extent, that most of the world's industrial employment (more than 70 percent) is now located in countries on the periphery (Foster et al., 2011b).

Global labour arbitrage i.e., wage differentials among countries and regions, has become a key pillar of the new global architecture. This allows capital to appropriate enormous monopolistic returns, or imperial rents, by taking advantage of the huge national wage differentials existing across the North-South divide, and the existence of subsistence (and below) wages in much of the Global South. Through the mechanism of global labour arbitrage (Delgado Wise and Martin, 2015), social and geographic asymmetries are reproduced on a global scale.

Social inequalities are one of the most distressing aspects of this process, given the unprecedented concentration and centralisation of capital, power, and wealth in a few hands, while a growing segment of the population suffers poverty, (super) exploitation and exclusion. Increasing disparities are also expressed, ever more strongly, in terms of racial, ethnic and gender relations; reduced access to production and employment; a sharp decline in living and working conditions; and the progressive dismantling of social safety nets (Klasen, et.al., 2018; Kiely, 2018).

The referred features imply an unprecedented attack on the labour and living conditions of the working class. With the dismantling of the former Soviet Union, the integration of China and India into the world economy, and the implementation of structural adjustment programmes (including the opening of tariff barriers, privatisations, and labour reforms) in the Global South, the supply of labour available to capital over the last two decades has more than doubled from 1.5 to 3.25 billion in, what Richard Freeman calls, the 'Great Doubling' (Freeman, 2005). This has led to an exorbitant oversupply of labour, that has scaled down the global wage structure and increased the overall precariousness of labour. According to estimates of the

International Labour Organisation, the number of workers in conditions of labour insecurity rose to 1.9 billion in 2019 —encompassing 58 percent of the world's labour force— with 2 billion (61 percent) located in the informal sector (ILO, 2019). It is important to note that these conditions are unevenly distributed worldwide; while the informal sector encompasses 90 percent of the working class in low-income countries, it represents 18 percent in high-income countries.

   The uneven distribution of the reserve army of labour, together with the uneven distribution of wages and working conditions, along, and within, the North-South divide, explains the growing structural pressures to emigrate internally and/or internationally under circumstances of extreme vulnerability that characterises contemporary capitalism.

The new face of human mobility: forced migration
Under the conditions engendered by contemporary capitalism, migration cannot be conceived as the product of individual or family decisions — as postulated by the neoclassical school of thought— and essentially becomes a phenomenon with its own patterns, embedded in a set of social networks and transnational relations. The massive scale of migration in the neoliberal er,a and the bond between domestic and international flows, are fundamentally determined by the contradictory and disorderly dynamics of uneven development. Migration thus adopts the mode of 'compulsive displacement' i.e., a new modality of forced migration, possessing the following two characteristics: (1) Migration is largely an expulsion process, resulting from a downward spiral of social regression, triggered by the deprivation of production means and subsistence, pillaging, violence, and catastrophes that jeopardise the survival of large segments of the population in places of origin. This is not simply a cumulative or gradual process, but an actual breakdown of the social order brought about by structural adjustment policies, domination and wealth concentration strategies, which have reached extreme levels, and are forcing massive contingents of the population — through accumulation by dispossession mechanisms (Harvey, 2005) — to sell their labour power, both

nationally and internationally, to guarantee their families' subsistence; (2) Compulsive displacement imposes restrictions on the mobility of the migrant workforce, depreciating and subjecting it to conditions of high vulnerability, precariousness, and extreme exploitation. If the process of expulsion is a reprisal of the original accumulation modes, characteristic of the first historical stages of capitalism, the current liberalisation of the workforce is fated to face obstacles in the labour market internationally. Migrant-receiving states regulate immigrant entry with punitive and coercive instruments that devalue labour, in addition to violating human rights and criminalising migrants. Conditions for labour exploitation and social exclusion, as well as risks experienced at different stages of transit and settling, jeopardise the lives of migrants (Márquez & Delgado Wise, 2011). Under these circumstances, migration has acquired a new role in the national and international division of labour. Uneven development generates a new type of migration that can broadly be characterised as forced migration. Although the conventional concept of 'forced migration' does not apply to all migrants (Castles, 2003), most current migration flows are forced displacements, and therefore require a more accurate descriptor. In the field of human rights, the term 'forced migration' refers specifically to asylum seekers, refugees, or displaced people. However, as previously argued, the dynamics of uneven development have led to structural conditions that foster the massive migration of dispossessed, marginalised and excluded populations. Thus, migration has essentially turned into a forced population displacement, encompassing the following modalities (Delgado Wise & Márquez, 2009):

(1) *Migration due to violence, conflict, and catastrophe*. Social, political and communitarian conflicts, natural disasters, major infrastructure developments and urbanisation can severely affect communities, social groups, families, and individuals, to the point of forcing them to abandon their place of origin and sometimes their country. This category includes refugees, asylum seekers and displaced people. These modalities, which tend to mainly affect populations in the Global South, have been

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acknowledged in international law and there are protection instruments in place. According to the United Nations High Commissioner for Refugees' figures, there are 79.4 million of such migrants worldwide, including 20.2 million refugees, 43.9 million internally displaced and 3.7 million asylum seekers (UNHCR, 2019).

(2) *Human trafficking and smuggling*. This modality of forced displacement has increased at an alarming rate in recent years, becoming a highly lucrative business due to the restrictive policies of receiving countries, and increasing hardship in less developed ones. Human trafficking is associated with coercion, abduction, and fraud, and includes sexual exploitation and illicit adoptions, among other serious violations of human rights. The global response to the sustained increase in this form of criminal activity —which has become increasingly profitable for organised crime— includes the United Nations' *Convention against Transnational Organised Crime*. This was signed in Palermo in 2000 and supplemented later by the *Protocol* to prevent, suppress, and punish the trafficking of people, especially women and children. It is estimated that at least 40 million people are currently engaged in forced labour because of internal and international human trafficking (IOM, 2019).

(3) *Migration due to dispossession, exclusion, and unemployment*. As argued in this section, most current labour migration falls under this category, which is characterised by extreme vulnerability, criminalisation, discrimination, and exploitation. It is by far the largest category of forced migration, encompassing around 120 million international 'economic' migrants. Instead of adequately categorising the problems and risks to which these migrants are exposed, they are generally subsumed under the notion of 'economic migrants', which assumes they travel in a context of freedom and opportunities for social mobility in transit and destination countries, ignoring the growing vulnerability, insecurity and forced disappearances to which these migrants are subjected.

(4) *Return migration in response to massive deportations*. This is a growing trend in international migration, associated with the irregular status faced by an increasing proportion of migrants, and derived from a state policy by destination countries — not a criminal act. It entails a process of double forced migration: they were forced to leave their countries of origin and then forced to return, under increasingly vulnerable and insecure conditions.

In a less strict sense, migration due to over-qualification and a lack of opportunities can be considered as a fifth type of forced migration. It ensues from the restructuring of innovation systems and structural imbalances in the labour market, as well as limited institutional support in peripheral countries, which result in many highly qualified workers being unable to find suitable occupation opportunities in their own country. This category of forced migration encompasses nearly 30 million professionals (OECD-UNDESA, 2013). While these migrants do not face serious problems when moving or seeking to cover their basic needs, they migrate to fulfil their labour and intellectual capacities in a context in which the demand for skilled and highly skilled labour has grown exponentially in the US and European countries, particularly in areas associated with innovation and knowledge intensive activities: Science, Technology, Engineering and Mathematics (STEM).

The international debate on migration and development — associated with the need to establish a global governance migration regime — has not been linear. Several disruptive events have influenced the course of the debate: the fall of the Berlin Wall in 1989 and the subsequent dismantling of the former Soviet Union; the attacks on the twin towers of New York on September 11, 2011; and the refugee crisis in Europe triggered in 2015. These events have contributed to an accentuation of nationalistic, xenophobic, and racial prejudices in the main migrant-receiving countries, positing the need to address an increasingly important and pressing topic in the debate: the securitisation issue.

Today´s right-wing populist rhetoric embraces a critical shift in the social construction of the 'other'

> … contemporary populism does not so much mobilize against the (perceived) enemy above but more against the (perceived) enemy from abroad. Populism has become more and more ethno-nationalistic. Populist anti-elitism today is directed against those who seem to be responsible […] for mass migration, against elites who have opened the doors to foreign influence and to foreigners (Pelinka, 2013: 9).

The securitisation issue in the early 21st century has been boosted by this xenophobic and populist/nationalistic wave (Bello, 2020). In line with the right-wing populist discourse, the worst stigmas attached to foreigners are those of illegality and criminality. In extreme cases, migrants are linked to terrorism and drug trafficking. Furthermore, in periods of economic depression, migrants are often held responsible for the economic decline. These portrayals demean migrants with a specific political intent, nullifying them as social, rights-bearing subjects.

Demystifying indicators

Regardless of the strategic importance of migration and development in the contemporary policy agenda, public perceptions of human mobility are fraught with myths that distort reality under a unilateral, de-contextualised, reductionist and biased view. The dominant political and research agendas in the field tend to reproduce — not disinterestedly — much of the prevailing mythology, disregarding the context in which contemporary migration takes place and its root causes. Human mobility is assumed to be a free and voluntary act, oblivious to any kind of structural conditioning and/or national or supranational agents. The multiple economic, demographic, social and cultural contributions made by migrants to host societies and nations are often ignored, hidden, or even distorted, regardless of their legal status and categorisation (economic migrants, refugees, asylum seekers and so on), to the point where the migrants —as mentioned before — are portrayed as a socio-economic burden for destination countries and in times of crisis are turned into public scapegoats.

In order to reverse, or at least confront, these distorted views, an effort has been made to build an alternative, solidly grounded, critical, comprehensive, and inclusive vision of the main drivers and consequences of contemporary migration, through a series of strategic indicators in several critical areas (Delgado Wise, et.al. 2015). An example of these indicators related to the Mexico-US migration system is the following: It is usually thought that immigrant contributions to the host country are minimal or marginal and that, conversely, immigrant integration into the labour market constitutes an act of 'generosity', that eventually leads to a decrease in economic productivity and the loss of jobs for native workers. The truth, however, is very different, even though it has been concealed and distorted in public discourse and, in such a guise, has tended to negatively influence public opinion. This topic has been left off bilateral and multilateral agendas between sending and receiving countries, but, more importantly perhaps, it has been pushed aside because of the decision to address the issue unilaterally, by arguing border control is a matter of national sovereignty. Ultimately, this reflects the way in which the doctrine of national security, which tends to criminalise migrants, has become the benchmark for public migration policies.

The fact is that, from 2000 to 2015, the main lever of growth for the US economy — at the time the largest in the world — was constituted by Latin American immigrants and their descendants. As shown in Figure 2 (below), their contribution to national Gross Domestic Product (GDP) growth was 45.3 percent. The group, with the greatest contribution by national origin, was that of Mexican natives (14.3 percent) which, when added to the contributions of Mexican descendants, reaches 31.3 percent.

The main economic sectors for the employment of Mexicans in the US changed between 1994 and 2020. Although the numbers in manufacturing grew in absolute terms, despite a widespread collapse in employment in said area due to the transfer of assembly plants to countries with a cheap workforce (e.g., Mexico), Mexican participation in the sector fell 13.8 percent in relative terms. Meanwhile, construction became the main source of jobs for Mexican immigrants, rising from 5.9 to 19.5 percent,

despite a significant drop due to the crisis (including the health crisis). Overall, and in terms of significance regarding economic dynamism, Mexican immigrant participation in the US industrial sector was 30.7 percent in 2020. An additional 25.3 percent works in professional services, business, education, and health; 13.8 percent in leisure and hospitality, and 10.2 percent in commercial activities. Another important sector is agriculture. Even though it only amounted to 5.5 percent in 2020, the vast majority of agricultural workers are of Mexican origin, mostly indigenous (see Figure 3).

Figure 2. US GDP growth contribution by worker ethnicity and migration origin, 2000–2015.
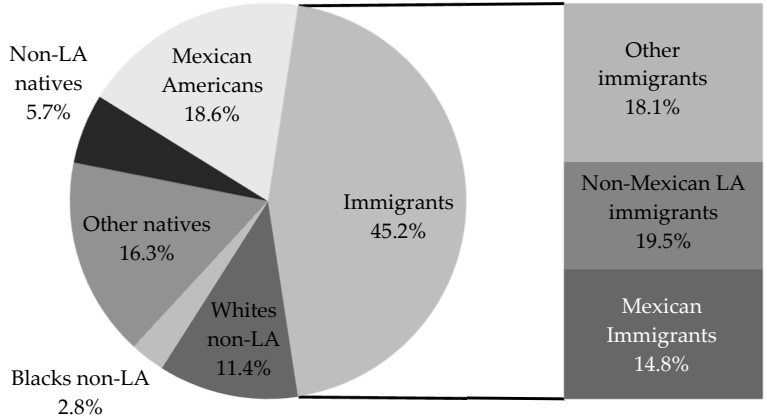
Source: Estimation based on US Bureau of Economic Analysis, Gross Domestic Product by Industry Accounts, and US Bureau of Census, Current Population Survey, March Supplement 2000 and 2015.

It is important to add that Mexican highly skilled migration to the US has increased exponentially in the last three decades (see Chart 1). In this period, the number of Mexicans with Master's and PhD degrees grew from 47,000 in 1990 to 207,000 in 2019, positioning Mexico in the third place of foreign graduates in 2019 (together with the Republic of Korea). This trend has noteworthy

importance, given the increasingly conspicuous role played by foreigners in innovation (53 percent of US patents were granted to foreign inventors in 2019) and knowledge-intensive activities in the US, particularly in high technology manufacturing (30 percent in 2019).

Figure 3. Main sectors of economic activity for Mexicans in the United States, 1994-2020
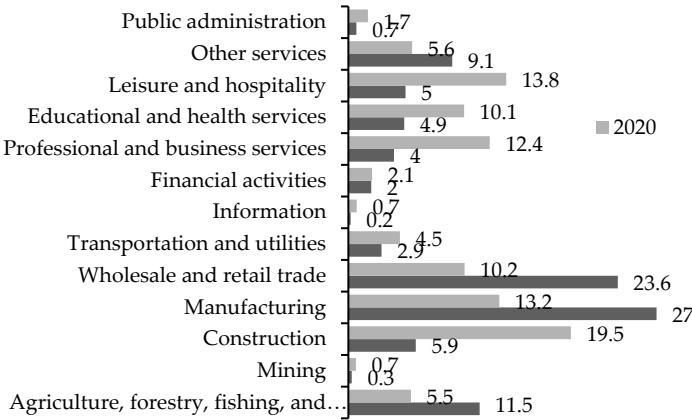
Source: SIMDE. UAZ. Estimation based on the Bureau of the Census; BLS. Current Population Survey, March Supplement (CPS) 1994 y 2020.

Chart 1. Mexican highly skilled immigrants residing in the US, 1990-2019 (growth rates)

	MASTER	PHD
1990-2000	10.3	7.2
2000-2010	2.5	3.5
2010-2015	11.6	10.8
2015-2019	9.6	19.0

Source: SIMDE UAZ, estimation based on *US Bureau of Census. Dataferret. Percent Samples* 1990-2000; from 2001-2017 on the *American Community Survey*; and 2018-2019 on the Current Population Survey.

Despite their significant contributions to the growth of the US economy, Mexican immigrants had the worst wage levels, when compared to other ethnic immigrant groups. This implies an ominous wage discrimination associated with the stigma of 'illegality'; it must be highlighted that 5.8 million Mexican immigrants (52 percent) bear that stigma (Passel and Cohn 2016). Another area of demystification relevant to the Mexico-US migration system lies with the widespread notion of remittances based on monetary fetishism; money is taken for granted without being related to the modes of social production that generate it. For orthodox discourse, the problem is to channel the cash sent by migrants to their relatives in the countries of origin, and to use it to promote development and stabilise national accounts. The emphasis has been on 'family remittances', as an instrument presumed to reduce poverty, because it is incorrectly assumed that these improve recipients' consumption capacity (Canales 2008). Most remittances are essentially wage earnings sent by workers to their financial dependents. Mexico is the largest recipient of remittances in Latin America, and the fourth one globally.

As evidenced by Canales (2011), the economic impact attributed to remittances is disproportionate: the growth of the GDP through the multiplying effect of remittances is 0.47 percent; the elasticity of the GDP with regard to remittances is 0.036; the impact of remittances in poverty reduction is 1.3 percent, the same as the impact of remittances in reducing inequality (Gini); the elasticity of poverty with regard to remittances is 0.221 and inequality elasticity (Gini) with respect to remittances is 0.221. The fact is that remittances represent a fraction of the wages earned by migrant workers, most often in conditions of labour overexploitation, and which are directed to support financial dependents in places of origin, while contributing to family reproduction. This includes the formation of a new workforce, with a high propensity to migrate (e.g., children, siblings, or other relatives) and support for the elderly and sick. Remittances play an essential role in ensuring social reproduction in conditions of poverty and social exclusion. Overexploited migrant workers, sending part of their wages to their poor dependents caught in a

spiral of family and community degradation, is a far cry from the apologist discourse on migration.

Considering the educational level of Mexican immigrants upon their initial arrival in the US, and the implicit educational cost, it is estimated that, between 1994 and 2008, Mexico transferred 83 billion US dollars (in 2008 figures). If said education had been undertaken in US public schools, the cost would have been 613 billion US dollars at constant 2008 figures, over the same period. As a reference, remittances channelled to Mexico —often seen as a waste of resources for the US— were only 30 percent of the educational resources transferred to the US via labour migration (see Figure 4).

Figure 4. Mexico: Cost of education and social reproduction of immigrants who entered the US between 1994 and 2008 versus remittances (billions of 2008 US dollars).
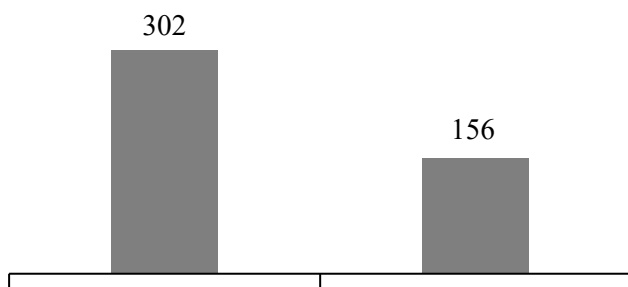
Source: Estimates based on Current Population Survey, 1994–2008; CONEVAL, Poverty Lines in Mexico; and Educational Statistics Yearbook in Mexico, 2008.

Despite the claims made by certain international bodies and governments, there is no empirical evidence of the alleged positive effects of migration and remittances as catalysts of development in countries of origin. While 'successful case studies' have been proffered in an attempt to support these claims, these usually involve self-help micro-projects that hardly contribute to sustainable local development initiatives, let alone

national ones. In fact, the dominant discourse has been forced to take an increasingly cautious stance.

Many other examples of demystifying indicators can be given and expanded to other migration corridors (Delgado Wise and Gaspar 2017). However, at this point, it should be already clear that there is a mythology surrounding the dominant narrative in the field. It encompasses an attempt to obscure the power relations, class relations and modalities of unequal exchange (as well as imperialist domination), underlying the dialectical relationship between migration and development.

The global governance on migration under scrutiny: towards an inclusive agenda

The efforts to build an institutional framework for the global governance of migration has followed a complex and uncertain route. The non-ratification of the 1990 *UN Convention on the Rights of All Migrant Workers and Their Families,* by most migrant-receiving countries, exemplifies the inherent complexity and limitations of this endeavour. Derived from the need to discuss pressing issues on the international migration agenda, a broader initiative for building a global migration regime was envisaged at the UN General Assembly in 2006, with its launch of the *High-Level Dialogue on Migration and Development* (UN-HLD). This initiative entailed focusing on the relationship between migration and development, in an attempt to avoid the negative connotations surrounding human mobility, particularly across the North-South divide. The first UN-HLD gave rise to the creation of a yearly, state-led, non-binding, related Forum, *The Global Forum on Migration and Development,* alternatively hosted by migrant-receiving and migrant-sending countries. In September 2016, the New York *UN Declaration for Refugees and Migrants* was adopted, giving rise to an intergovernmental consultation and negotiation process that culminated in the adoption of the *Global Compact for Refugees and the Global Compact for Safe, Orderly and Secure Migration* (GCM) on December 18, 2018. The US did not participate in the negotiation process, and 14 countries did not attend the international conference in Marrakesh where these non-binding agreements were embraced.

At the heart of the debates surrounding the final adoption of the *Global Compact for Migration,* was the attempt to reconcile two irreconcilable positions: a human rights-centred approach and the securitisation question which reaffirms the right of states to criminalise migrants under the façade of the right of states to control 'illegal' migration (Schierup, et.al., 2019).

Although the UN-HLD, GFMD and GCM —as core engines of the global governance of migration— are essentially inter-governmental spaces, the participation of civil society in these spaces has been recognised as both useful and necessary. Many contributions to the debate on migration and development, particularly in support of the counterhegemonic perspective, have been made by the progressive wing of civil society participants. However, this possibility is structurally and institutionally limited.

The concept of human development, coined by Amartya Sen and adopted by the UN in the *2030 Sustainable Development Agenda,* represents a positive step in the furthering of the development debate. It cannot, however, adequately address the complex dynamics of unequal development, forced migration, and human rights infringements under contemporary capitalism. There is a need for: (a) further contextualisation; (b) a clear identification of the competing social projects; (c) the creation of viable pathways that lead to the political and institutional strengthening of social organisations, movements, and networks; and (d) the definition of alternative and transformative agendas. This implies the need to rethink development in a much deeper way, so as to understand the dynamics of uneven development. In this regard, the Latin American critical development school of thought has made important contributions for advancing towards a counterhegemonic agenda on migration and development; one capable of envisioning, in theory and practice, avenues to overcome, and transcend, Latin America's asymmetrical and subordinated integration into the world capitalist system (Delgado Wise, 2014). At the same time, and counterposed with the regressive model of development propelled by neoliberal globalisation, it is crucial to rethink development from a post-neoliberal perspective.

The consequences of the COVID-19 pandemic are uncertain. An immediate effect of the pandemic has been the mass unemployment of broad segments of the population, exacerbating nationalist, xenophobic and racial prejudices. Most likely, this situation will be further aggravated by the strong tendency to deepen automation in the face of population confinement. It will also accelerate the current trend toward monopolisation. The pandemic is, likewise, having devastating effects on social security, health systems and all sectors associated with human mobility; a situation that is already having severe repercussions for millions of migrants and refugees, including fatal victims of the disease. Beyond its adverse implications for the working class, and particularly for its most vulnerable segments such as that of forced migrants, it is engendering the worst economic recession in the history of capitalism. The impacts of the recession on the migrants' countries of origin will be even more devastating, due to their structural weaknesses. Paradoxically, contrary to what the World Bank predicted, remittances have not decreased, and represent an invaluable source of income for both the migrant's families and to support the deteriorated balance of payments in the migrant-sending countries. Access to foreign exchange becomes particularly critical in times of COVID-19, not only to confront the public health emergency, but also for a possible economic recovery in the medium and long term.

What may come out from this epochal crisis — for its metabolic relation with nature (Foster, 2013) — is unpredictable, but what is certain is that it will radically transform the current economic and geopolitical global landscape.

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PART II: EXPERIENCES

6. MIGRATION RESEARCH IN SOUTH-EAST EUROPE: THEORETICAL, METHODOLOGICAL IMPASSES AND MOVING FORWARD

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Introduction

The chapter presents and considers crucial methodological considerations in the analysis of migration to South-East Europe. In the context of new migration flows, that are by now becoming dominant forms of movement, previous research inadequacies are being shown up. The problematic emphasis on immediate policy recommendations, as well as the proliferation of articles in a 'publish or perish' academic culture, have resulted in a well-documented inability to produce valuable and consistent migration research agendas. These, we argue, require a set of theoretical assumptions that acknowledge the following. *Firstly*, migration is a long process, the analysis of which requires a holistic understanding of events and changes occurring in the countries of origin, in intermediate countries, and lastly, in host societies. The continuing emphasis, solely on this last part of the process, often leads to weak explanations and poor policy recommendations. *Secondly*, while the research focus may differ, the attribution of methodological weight to the values and beliefs of migrants, adds value and sheds light on the effects of these long migration processes on the subjects themselves. To illustrate our argument, we present a set of theoretical and methodological suggestions that concentrate on theories of the middle range and qualitative participatory methods.

Migration research in Southeast Europe

It is not the ambition of this chapter to provide an overview of migration analysis in Southeast Europe. Rather, the intention is to consider the academic response to these movements. More specifically, we will look at the overall characteristics of the academic response; the theoretical and methodological problems it creates; and crucially, the lessons that can be learned. This in

the context of the emergence of a more dense and more permanent migration flow from countries of the Global South.

Following the collapse of the Soviet Union, and the various socialist states in eastern Europe and the Balkans, a considerable migration movement took place in the early 1990s. Less than a decade later, many of the people still living in these states suffered the consequences of a further collapse of their newly (and poorly) organized economies, resulting in a second migration wave (Korovilas 1999). These movements significantly altered many European societies, including those from which migrants originated, as well as the ones in which they later found themselves. The academic response to these developments was an overproduction of articles and books, based on research funded by various – but mainly state or EU based – institutions. The result was a plethora of analyses that did not produce unifying theoretical or methodological outputs (King 2012).

2015 saw a huge escalation in the level of migration into Europe and marked the beginning of the refugee crisis, with hundreds of thousands of people fleeing conflict and persecution in war torn countries. The majority of these refugees travelled across sea borders, either between Turkey and Greece, or between North African countries and Italy or Spain. The consequences of this movement are still felt throughout Europe, with many countries adopting deterrent migration policies which result in large numbers of migrants enduring horrendous living conditions in refugee camps for long periods of time.

That second movement of people as described above is quite different to the earlier European based migration of the 1990s. It differs in terms of the incentives behind migration, the legal status of migrants, and more importantly, the ability of people to enter host countries. However, the academic response and analysis of today seems to follow that 1990s pattern of overproduction, which quite rightly has come in for criticism (Castels 2007; Castles et al 2014; de Haas 2010). This chapter will now go on to a) summarize this criticism, detailing what we understand to be the three main and interconnected issues which have led to this theoretical and methodological impasses and b) propose ways in which we could move forward with a meaningful and impactful

research agenda. The aim is to explore the main reasons for this impasse and suggest how it might be overcome.

The *first* issue relates to the ever-increasing predominance of *policy-oriented research*. While the demand for such research, from both national and international organisations, provides social scientists with the resources to carry out research, the focus of the research is inevitably circumscribed by the requirements of the funder. Such research is designed to answer policy questions that might be narrowly focused or – in the case of state-funded research – constrained by time demands e.g., the time frame for implementation may be required to correspond to an electoral cycle of three to five years (Castels 2007). This often leads to proposals for simple and short-term remedies to long and complicated social processes resulting, not only in bad science, but in poor policy formation. Policy oriented research in the field of migration is not a new phenomenon (Cornelius et al 1994, Bhagwati 2003, Castels 2004a), but the recent refugee crisis has seen a definite increase in this approach. An obvious example of this type of research is in the area of migrant integration, where funding is provided towards the creation of algorithms to identify locations for migrant settlement that would, supposedly, best facilitate integration (Bansak et al 2018, Masso and Kasapoglou 2020). This approach seems to completely disregard decades of academic research on the many complexities of integration (Goodman 2015) and, indeed, the problematic theoretical assumptions behind the whole concept (Schinkel 2017). Meaningful research cannot be circumscribed by the funding received or by the institutions providing it. Social scientists carrying out such research must be free to define the research problem and the social context within which it is situated.

The *second* issue, and one connected to the first, is *the 'publish or perish' academic culture*. The dominance of global capitalism has led academia to the, by now undisputable, submission to, and dependence on, market forces (Ivancheva 2015). The 'publish or perish' culture is nothing more than the expression of a coercive work ethic in the context of this subordination (Taberner 2018). Work insecurity within academia demands an ever-increasing number of publications, which often results in hasty conceptual

and methodological choices. Given that scientific specialization is similarly ever-increasing, researchers are often left with little choice other than to reformulate or re-present ideas within a narrow scientific focus (Glenn 1989). This contributes to the problem of short-termism within migration policy-driven research, as output and citation are pursued, and time for reflection becomes a luxury that the vast majority of academics cannot afford (Weeber 2006). The principles of this culture becoming embedded and unquestioned has further knock-on effects, with new generations of migration researchers accepting this approach. It contributes to the delegitimization of theory construction by reducing it to simple 'armchair' analyses and favours fragmented and short-term research goals, that are too narrowly defined and theoretically decontextualized (Boden and Epstein 2006).

The *third* issue, linked to the previous two, is particularly important in the context of the refugee crisis. It concerns *not utilizing extant and previous research*, thus undermining our ability to connect previous intellectual outputs to our present research concerns. This can lead to a 'wheel reinvention' problem where time, resources and intellectual abilities are spent without addressing pressing issues. The example of commissioned research into refugee integration, mentioned above, – and its apparent disconnection from existent migrant integration research – is testament to this problem. Not utilizing previous intellectual outputs further undermines the already humble predictive properties of social sciences by disregarding strong indications towards specific developments (Rosenberg 2016).

Moving Forward Through Middle-range Theories

Given the serious problems that we face in researching migration, what then would be an appropriate approach to the subject? The route that many scientists have taken is to isolate specific aspects of migration and analyze them. Even though it disregards particularly long and complicated processes (Castles 2004b), it is still favoured by policy-based analyses, since it tends to minimize the number of 'variables' involved in scientific explanation. In migration processes the 'variables' are so many and their

interconnections so intricate that it becomes impossible to account and control for all and reach valid and reliable conclusions. In order to deal with these methodological shortcomings, it is important to turn to explanatory frameworks that acknowledge the complicated nature of migration with its long processes that are embedded in social, political and cultural relations (Castles 2007). More specifically such frameworks should acknowledge the significance of a) developments in both host and origin countries and b) cultural aspects and meaning-bestowal that inform the migration process and are generated throughout.

However, If the researcher simply delves into the conceptual space created here, they run the risk of engaging in purposeless and non-unifying academic enquiry. This was the type of enquiry that dominated much of 20th century sociological discussion, resulting in often insightful, but seldom actionable, macro-level analysis. At this point the persistent warning of Robert Merton comes to mind:

> To concentrate entirely on the master conceptual scheme for deriving all subsidiary theories, is to run the risk of producing 20th century sociological equivalents of the large philosophical systems of the past, with all their varied suggestiveness, all their architectonic splendour and all of their scientific sterility (Merton 1957:10)

So how can we incorporate the essential elements of migration analysis, as set out above, and yet avoid running our theoretical 'ship' onto the cliffs of scientific sterility? The answer lies in the application of two particular, crucial variables, that both conceptually cover and run through the entire migration process. these are a) the attitudes and beliefs of migrants themselves and b) labour as a generator of both income and values. The application of these variables help to further delineate our conceptual space and to generate middle-range theories, which in turn, can provide specific testable hypotheses while, at the same time, acknowledging the lengthy and complicated nature of migration processes.

The *Holistic Approach to Migrant Exclusion* (Xypolytas 2017a) provides such a theoretical background and follows a Marxoweberian reasoning. It places strong emphasis on the issue of work, specifically considering the following: the impoverishment of the labour force in the country of origin; migrant labour allocation in specific labour markets in host countries; and labour control that generates specific values and beliefs in the migrant labour force. More specifically, the holistic element of the theory implies an understanding of the entire migration process, which is analytically separated into three distinct stages:

1. The **preparation** of the migrant labour force. This is the process whereby attitudes, values and incentives are generated in the country of origin. These relate to the experience of economic and social crises that preceded migration and positioned future migrants into the social space of casual and low-status work.

2. The **allocation** of the migrant labour force. This stage is related to the organisation and function of labour markets in the host country and the placement of migrants in low-status jobs.

3. The **habituation** of the migrant labour force. This stage involves the internalization of the characteristics and demands of migrant labour, leading to the prolonged stay of migrants in their jobs and the reproduction of their social position. This includes consideration of exploitative situations.

PREPARATION

The preparation stage involves the sociological analysis of important developments that take place in the country of origin. More specifically, it focuses on the period during which people experience multiple forms of marginalization that eventually lead to their decision to migrate. There are two distinct ways that country of origin has been dealt with theoretically heretofore. The first is through the understanding of economic and social developments in terms of push factors. The second involves the acknowledgment of the cultural aspects of marginalization in the

country of origin, as an important socialization stage that goes on to play a crucial role in the later social actions of migrants.

There is a long tradition in macro perspectives on migration that looks at the problematic living and working conditions in the country of origin as mere factors that push people to choose migration, as a means to seek better employment and living conditions (Harris and Todaro 1970, Todaro 1976). Here, the influence of neoclassical economic thought is evident, as peoples' choices are explained in the context of the individual management of scarcity. Research linked with this interpretation of the country of origin is, almost exclusively, on the macro-level, supported by quantitative data. Developments in economy and labour market are quantified, in both sending and receiving countries, individual characteristics are factored in in the form of human capital, and population movements appear as explained and – more importantly – predicted.

Criticism of this rationalization of migration varies and comes from different theoretical perspectives. But if we were to summarize, we would say that many of the 'laws' that govern movement (Ravenstein 1888, Grigg 1993), although they appear as rather self-explanatory, have not been supported empirically (Boyd 1989, Castles and Miller 1993, Portes and Rumbaut 1996, Psimmenos 1999). They often ignore the historical relationships between the country of origin and the host country, particularly in the case of colonialism (Mandel 1972, Wallerstein 1987, Portes and Rumbaut 1996, Waters 1995).

Arguably the greatest weakness of this approach lies in its innate tendency to look at individuals as mere agents of economic action. It creates an anthropological type (homo economicus) that is based solely on economists' abstract assumptions concerning the motives for human action. It fervidly refuses to take account of the social relations in which these actions are embedded and, most importantly, the actual experiences of the subjects themselves (Sen 1977, 1982). In the case of migration research specifically, and the analysis of the country of origin, this tendency is very obvious since the entire space, and the experience of migrants within it, is seen almost exclusively in unfavourable economic terms.

However, the impoverishment, and the crises in the countries of origin, are so much more than a mere economic phenomenon. It is during this period that people experience the consequences of these crises, though radical changes in the workings of essential social institutions, such as the economy and the family (Komarovsky 1940). These changes are not simple push factors. Instead, they represent crucial ruptures in the biography of people, who in order to deal with the effects of crises, are forced into making choices that might have been inconceivable in the past (Xypolytas 2017b). These 'forced choices' are made prior to migration, they alter peoples' perception of economy and society but, more importantly, they prepare future migrants for their social position in the host countries.

ALLOCATION

The allocation of migrants to specific labour markets in host countries is the second stage in this process of exclusion. Looking at the issue on a macro-level, there are two important issues to be addressed. First, the indigenous labour force is 'freed', in several ways, from many types of low-status labour and employment (Pearson 1986) with migrants allocated to more undesirable and low-status jobs e.g., domestic work, manual labour. Hence, there exists a clear distinction of status between the labour activities of indigenous workers and migrants. with the former perceiving their relation to work being beyond that low-status social space (Potts 1990; Psimmenos 2000). This is directly related to Weber's understanding of social closure, according to which 'a relationship will…be called "closed" against outsiders so far as, according to its subjective meaning and its binding rules, participation of certain persons is excluded, limited, or subjected to conditions' (Weber 1978: 43).

Second, the allocation, and prolonged stay, of migrants in low-status jobs, generates specific values in the host country about the appropriateness of migrants filling these places. These values lead to arbitrary, yet persistent, stereotyping about the ability of specific nationalities, or even races, to execute specific types of work (DuBois 1995; Psimmenos and Skamnakis 2008). Furthermore, this creates a demand for new forms of work, or

tasks, that simply would not exist without the allocation of migrants to low-status jobs (Anderson and Phizacklea 1997, Anderson 2000). In these new labour markets, gender, nationality, and race become necessary prerequisites for engaging in specific types of work.

On the other hand, looking at migrants and labour markets on a micro level suggests that there are a number of different factors that influence the job allocation process. Aside from the migrant's already low expectations with regard to work and social status as a result of migration, the actual migration to the host country is perceived in the context of finding work in order to cover immediate economic needs. Further to this, many migrants arrive in their host countries, with significant debts that they have incurred in the process of their journey (Xypolytas 2017b). The movement itself from one country to another is expensive and most migrants cannot cover this amount unless they borrow a considerable amount of money, and often from non recognized sources (Rapoport and Doquier 2005, Kugler et al. 2013). The need to repay these loans forces migrants to immediately seek employment in the host country, without taking time to familiarize themselves with the characteristics of the labour markets into which they are moving. This does not allow for engagement with the host country as a social space where one can utilize previously held skills or engage in the process of learning new ones.

The importance of networks for analyzing migration, especially regarding job search and support, is a recurrent theme in the literature (Fisher 1982, Boyd 1989 Hondagneu-Sotelo 1994). However, the role of immigrant associations with regard to job allocation is one that also demands investigation. There are many reported cases where these important collectivities end up functioning as informal job-search firms (Fouskas 2012). In situations where newly arrived migrants are unable to find work, migrant associations often steer job-searchers to types of work which are stereotypically linked to their specific race or ethnicity. This particular form of self-determined racial and ethnic division of labour inevitably contributes, albeit unintentionally, to the

identification of certain ethnic and racial groups with specific types of work and, ultimately, to greater exclusion.

HABITUATION

The third stage in the process of migrant exclusion is that of habituation. This refers to the way low-status work in host societies generates a cultural system of dispositions and tendencies. These organize the ways in which workers perceive the social world around them and how they react to it (Lizardo 2004). This is a crucial stage of the entire process of migrant exclusion. It crystalizes social stratification in that it undermines their social mobility and cements their exclusion in values, beliefs and actions (Myrdal 2007). In order to create an understanding of this stage, it is necessary to look to the contribution of industrial sociology / sociology of work, particulary research into the subjective aspects of labour such as the perceptions of work and the generation of specific labour identities.

The underlying premise of this approach is that work is much more than mere economic action. As opposed to the postulations of neoclassical, or orthodox Marxist analyses, paid labour is not just an activity that, at the end of the day, simply generates income or surplus value. The term 'paid labour', after all, is comprised of two words and these theoretical approaches try to explain only the 'paid' aspect. The second term, which is 'labour', remains unclarified by such analyses. Indeed, if anything, they serve to undermine the sociological analysis of the consequences of work and, most importantly, of the motives and constraints that workers face on a daily basis.

The subjective aspects of labour represent, arguably, the most important theme in industrial sociology from the 1950s onwards. There is an abundance of studies that looked at this in the context of industrial labour (Roy 1953, Blauner 1964, Burawoy 1979, Edwards 1979); agrarian production (Newby 1977, Cornfield and Keene 1990); and service work (Hughes 1951, Mills 1953, Hochschild 2003). The common thread, in all these studies, is an understanding that work generates values and beliefs that affect workers' social identity and leads to the internalization of the characteristics and demands of their labour (Baldamus 1961).

Research into the sociology of work addresses, not only the objective and subjective aspects of labour, but also the reasons behind the often-protracted stay of workers in their jobs. This is what is often called *reproduction of work* and refers to workers remaining in a work environment, even in situations where that environment is undesirable (Erickson 2010, Xypolytas 2013). In analyzing migrant exclusion, this cultural aspect of work is essential for our understanding of the stage of habituation, which refers to the prolonged stay of migrant workers in low-status jobs for reasons that are not related to economic coercion, but to the personal identification of the workers with the demands and characteristics of their work.

Empirical validation of this stage is not straightforward in the sense that the way migrant workers internalize the characteristics and demands of their work is related to the particularities of each specific job. Greater empirical scrutiny of the habituation stage can be carried out through case studies of specific occupations and types of work since the internalization process is empirically bound to the specificities of the labour process. This involves looking at the subjective aspects of work through the study of tasks and the way they are perceived by the workers. Particular importance must be paid to the relative satisfaction of work, that is to the dimensions of labour which generates a sense of content within the workers and contributes decisively to their prolonged stay in a job, even in situations of difficult working conditions, (Baldamus 1961, Erickson 2010).

Methodological implications

The framework, as outlined above, suggests that, even the relatively narrower focus of middle-range theories, involves a number of methodological issues that need to be addressed in order to produce valid and reliable research. Identification and categorization of these issues is the concern of this section of the chapter.

DE-ECONOMIZATION OF MIGRATION ANALYSIS AND EMPHASIS ON MIGRANT NARRATIVES

In all three stages of the holistic approach, particular emphasis is placed on moving away from simplistic economic explanations and focusing instead on attitudes and beliefs of the actors involved, namely migrants. From the preparation stage, with its focus on cultural changes in the country of origin, to the habituation stage and the internalization of labour values, the analysis is moving away from economic determinism. This conceptual and analytical process of *de-economization* is essential in order to appreciate the attitudes and incentives of migrants in the context of sociopolitical changes. It is through these cultural aspects that migration can be understood, and not through the abstract incentives of *homines economici*. Capturing the 'voice' of migrants is far more effective scientifically, than speculation on motives, based on an artificially and economically constructed anthropological type, that possibly does not exist and, arguably, never existed (Sen 1977).

The above leads us to the obvious conclusion that what is required is a methodological shift to *qualitative participatory* approaches (Castles 2007). Practically, this suggests, firstly, a reduction in the reliance on official data sets, as within these tends to lie the often-problematic assumptions that undermine much migration research. Each piece of data, however straightforward or self-explanatory it may appear, is part of a larger theoretical context. Simply utilizing data from other sources skews our perception and overall explanatory vigour (Vartanian 2011).

Secondly, where the use of secondary data is required, as it often is, it is important to recognise the limit to interpretation offered by literature or theoretical speculation. The decisive illuminating factor here, as elsewhere, is none other than the interview. Far more than a simple methodological tool, qualitative interviews, in the various forms that they take, shed light on social processes and mechanisms that are essential in scientific argumentation (Kvale 1994). In this particular case, even more so, as they allow the migrants themselves to help define the issues and engage in research processes that might be otherwise

unrelated to the lived experiences of the subjects themselves (Chambers 1997).

RESEARCHING THE COUNTRY OF ORIGIN

The second important methodological issue is the requirement for analytical emphasis on the developments in the country of origin. This of course is anything but new, given that, from the earliest days of sociological research of migration, the country of origin was a quintessential part of the analysis. The *Polish Peasant in Europe and America* (Thomas and Znaniecki) published in 1918 and, arguably, a classic sociological study of migration, clearly established the theoretical and methodological necessity of research engagement with the country of origin. For the writers, it was impossible to fully understand the complexities of polish migration to the United States without taking into consideration the drastic changes in the structure of the polish countryside (Thomas and Znaniecki 1918/1984). These were not considered only as simple push factors for migrating, but the changes in the structure and organisation of family and community in Poland were seen as essential explanatory tools for understanding the social relationships that were established by polish migrants in America (Psimmenos and Kassimati 2006, Xypolytas 2013). Unfortunately, over the years, the importance of such classic studies as this were viewed more in terms of their honorary significance for the history of the discipline, and not so often appreciated for their profound scientific value.

So, what does this theoretical 'return to the country of origin' imply methodologically? If we are to revisit the methodological example of Thomas and Znaniecki, there are two issues to consider. It has by now become clear that migration is understood as a particularly long social process, the beginning of which significantly predates the moment of departure for the migration journey. The various social, political and cultural developments that lead to this decision are of particular importance and a methodological tool is needed that will account for them, as well as for the changes and personal consequences it raises for the migrants themselves (Thomas and Znaniecki 1918/1984). Biographical interviews, or life stories, utilize history in order to

account for the continuities and discontinuities in the life of an individual. At the same time, they serve to create understanding of greater social structures through arguably the most effective manner – by tracing their impact and consequences on the biography of men and women (Mills 1958; Thompson 2000).

However, regardless of the importance such interviews hold for both social theory and social research, there are some practical implications that must be considered. There is an inherent methodological danger in basing scientific results solely on biographical interviews, or life stories. That danger can be described as the accuracy of reconstruction. When one – say, a migrant – is asked to describe their past, it is often the case that it is described through the lens of the present. Specifically, when it comes to perceptions, values or beliefs, it is understandable that the interviewee might reconstruct their past with the building blocks of the present (Schimank 1988). In other words, they might emphasize continuities where there are discontinuities or vice versa (Alheit and Hanses 2004). In order to construct a sense of self, often a coherent narrative is preferable to a fragmented one, and the long process of migration is sometimes filled with breaks and crises (Hall 1993). This is not to say that interviewees are deliberately lying or omitting the truth, rather it is an acknowledgement of the limits of reconstructing the past (Ekman 1997).

This does not mean that we should give up on biographical interviews or life-stories. Instead, it means that we need to combine them with the second methodological principle offered by Thomas and Znaniecki, which is to conduct research on an international scale. Apart from using life stories and life documents of Polish migrants in America, Thomas also conducted research in Poland itself. This allowed him to better understand the social and cultural context of the country of origin as well as the overall migration process. By simultaneously conducting research on both sending and receiving countries, we will be able to control for problems of reconstruction accuracy by properly contextualizing the individual narratives. The researcher's task is not to ascertain the truthfulness of a migrant's story (which is definitely not the role of a social scientist) but

rather to understand its importance for the construction and maintenance of an individual social identity (Atkinson 1988). This can only be achieved by having an understanding of the different sociocultural developments in the countries of origin and of the effects they have had on the migrants themselves, including on their incentives and aspirations.

A century after the publication of the *Polish Peasant in Europe and America*, developments in the overall scientific community have created an ideal environment for the resurrection of their approach, as consortiums from different countries and institutions have been formed with the sole purpose of conducting international research. It is important to use the opportunities created to move past simple comparative analyses and engage in research which utilizes theoretical frameworks that explicitly involve different spatial developments (Castels 2007). It is also important that these be unified both conceptually and methodologically, so that they do not degenerate into the type of opportunistic collaborations discussed previously, where the focus is on pursuit of academic advancement or economic opportunity.

Concluding remarks

The aim of this chapter was to outline the main characteristics of research in migration to southeast Europe and to point up certain research shortcomings that have been previously identified, and which have re-emerged in the scientific analysis of the recent refugee crisis. One of these is the narrow and short-term focus on specific issues which does not allow for more unifying intellectual outputs. In addressing these issues, we have proposed a conceptual space that acknowledges the long and complicated processes of migration in both host and sending countries, while at the same time emphasizing the cultural elements that are generated throughout. This space gives priority to the experiences of migrants and further focuses on the issues of labour. This led us to the development of a theoretical construct of the middle range, which we call the *Holistic Approach to Migrant Exclusion.* It is, by no means, all-encompassing but it is broad

enough to be unifying, while allowing room for various different research hypotheses within its three separate stages.

The methodological implications behind the framework reside quite clearly within its theoretical confines. The emphasis is on qualitative and participatory methods that include biographical interviews and life-stories that cover the long periods and processes of migration. In order to further elaborate the social and cultural context within which migration takes place, international research partnerships with countries in the global south are essential. Ideally, research should take place in both sending and receiving countries, which will allow for a holistic view of the long processes involved (See Figure 1 below for a schematic overview). The research should also be further focused on labour trajectories and work orientations, since both are central to our understanding of migrants' social position in host countries.

Figure 1. Evolution of methodological choices concerning migration to southeast Europe.
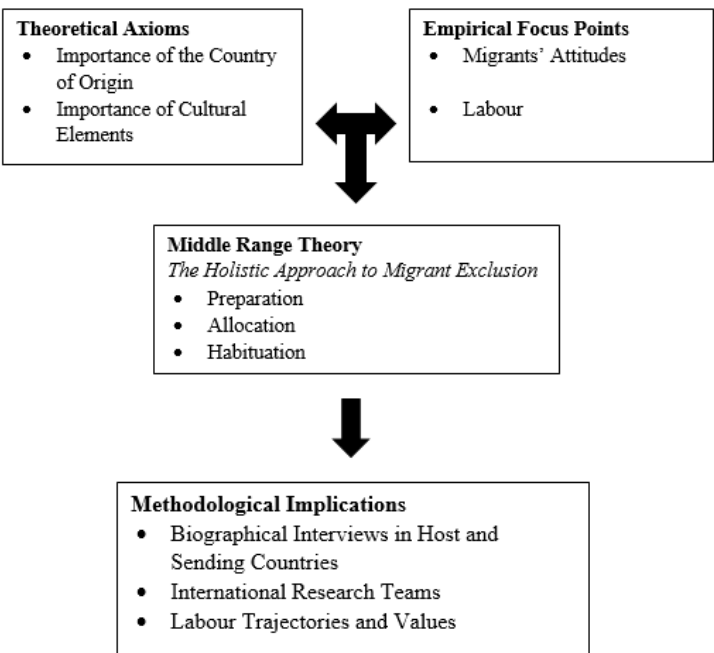
We do not underestimate the challenges that actualisation of this research design will present. It is necessary to bring together international research teams who are prepared to follow a rather strict conceptual and methodological path. Qualitative participatory approaches need specialized social scientists and sufficiently long time periods for data gathering and analysis. However, given the importance and persistence of the refugee crisis, it is time raise the level of migration research and analyses. Our focus should be based on social and scientific problems that emerge and are defined by migrants themselves who, given their situation, are likely to be a more reliable source of information than international organisations and nation states. The latter seem to be quite specific and non-apologetic in their goal of migration control (Cornelius et al 1994). It is not the role of social science to lift the moral burden of turning institutional agendas into theoretical assumptions.

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GIMAAA Group

Introduction

In this chapter, we propose to present the paths walked as a research team since 1990, when we formed a heterogeneous and diverse group in terms of age, gender, personality and academic training, today called the Research Group on African Migrations and Afro-descendants in Argentina (GIMAAA)[13]. Intellectually and affectively involved in our work, a fruitful atmosphere was created for brainstorming, giving rise to a context of reciprocity from the passion that joined us - research into migratory groups located in the province of Buenos Aires. Our physical workspace was established in the Migratory Movements section of the Ethnography Division of the Museum of Natural Sciences of La Plata National University (UNLP). In the early stages of our work, much of the focus was on sourcing funding to enable us to carry out the research. In the following sections, we will outline the periodization of the work carried out, taking account of the study's central axes and the theoretical-methodological approach developed by the group.

Stage One: Cartography of migrants in the Province of Buenos Aires

In 1997, we obtained an initial grant from the National Council for Scientific and Technical Research (CONICET), to develop the project '*Construction of a sociocultural database on immigrants and their descendants (with the exception of Spaniards and Italians), located*

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[13] Nowadays the GIMAAA consists of Marta M. Maffia (anthropologist), Bernarda Zubrzycki (anthropologist), Ana Cristina Ottenheimer (anthropologist), Paola Monkevicius (anthropologist), María Luz Espiro (anthropologist), Sonia Voscoboinik (psychologist), Nicolás Herrera (sociologist) and Rocío de la Canal (geographer).

in the province of Buenos Aires (Argentina)'. The following year we received funding from the National Agency for Scientific and Technological Promotion (ANPCyT), which allowed us to continue with the project. The work was guided by two general objectives: (a) to map and identify the associative tendencies in different Buenos Aires municipalities and (b) to characterize the sociocultural profile of the mapped migratory populations/groups. This project represented an unprecedented survey in the field of research on migration in Argentina[14].

The resulting cartography gave rise to a general map of location and distribution of the different immigrant communities and their descendants in the province, breaking down into 46 location maps for each group and their associations in the selected municipalities. We also obtained a significant amount of photographic and documentary material, resulting from field work.

The greatest methodological challenge at this early stage was that of problematizing, in a comprehensive and interdisciplinary way, the plurality of collected information. It consisted of both quantitative material, which was obtained through traditional methods, mainly surveys, and qualitative material constructed from ethnographic work with techniques such as observation with different degrees of participation, interviews, and life stories. It also included information obtained from census analyses and written documentation, resulting from trips and correspondence. Some results of what was produced in the articulated instances of field and laboratory work were published in the book *Where are the immigrants? Sociocultural mapping of immigrant groups and their descendants in the Province of Buenos Aires* (Maffia 2002).

The conclusions of this first stage of work are still valuable to us, despite the time that has elapsed since obtaining and analyzing the empirical material. In addition, they represented a starting point that allowed us to identify research elements that

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[14]Since the province of Buenos Aires has a total area of 307,571 km2 and has 135 municipalities.

were emerging as significant. For instance, within the organisations we identified the growth of tension and conflict in relationships. There were numerous differences among members, especially in terms of capitals (economic, social, cultural, educational, militant). There were issues around hierarchical structures and generational and gender problems, which produced a conflictive asymmetry of power. Among those in leadership positions, we perceived a great resistance to change, while the young pro-active men and women who were emerging, were more militant and had very different management styles. A novel issue with regard to the diversity of the Argentinian migratory groups is, that in the 1990s, immigrants from sub-Saharan Africa (Senegalese, Nigerians, Cameroonians, and others) began to arrive in the country, although in non-significant numbers. However, they aroused our interest and led us to the formulation of several projects that included them as key empirical references.

Stage Two: From sub-Saharan African migration to 'Afro-descendant' presence.

In the second stage of work, our aim was to explore the main historiographic, socio-anthropological, and demographic backgrounds of the African origin population, and to review some of the field observations that were more significant and suggestive to us. Before going any further, it is important to note that those representations of the collective imaginary, permeated by the belief of an ethnically homogeneous and racially white Argentina, were established from a work of cultural engineering resulting from the beginning of the national construction process. This 'absence' of diversity is the product of a particular otherness formation (Segato 2007), characterized by the 'ethnic terror' that would have given rise to a deliberate political will to eliminate any 'way of being the other', putting pressure on ethnically marked people so that they would move from their categories of origin, through formal and informal mechanisms of persuasion, distortion and even extermination. With reference to Africans and their descendants specifically, Segato adds that:

the disappearance of the black in Argentina was ideologically, culturally, and literally constructed rather than strictly demographic (...) their presence was first excluded from the official representation that the nation gave itself (2007: 255).

On the other hand, Frigerio (2008) argues that, together with the existence of a dominant narrative of nation that emphasizes whiteness, there is a system of racial classification that invisibilises the black on a daily basis. He claims that both these factors, added to certain theoretical frameworks once in vogue, have conditioned academic research in such a way, that most of it carried out during the twentieth century focused on the topic of slaves and free blacks between the seventeenth and nineteenth centuries. Our group has worked on this invisibility problem with respect to African migrants from the Cape Verde[15] archipelago, during the first half of the 20th century. Cape Verdeans, following the tradition of other immigrants who arrived in the country, organized themselves into mutual aid associations and both natives and their descendants were active participants in a process of 'Argentinization', when promoting an identity strategy within the group, characterized mainly by the 'invisibilization' of the African component.

Regarding the observations, resulting from the field work of that decade, we registered that some Cape Verdean immigrants and their descendants, along with other Afro-Argentinians, began to develop political strategies of Africanity recognition, beginning a growing process of visibility This temporarily coincided with the migration to Argentina, as we have already mentioned, of groups of Africans from Senegal, Cameroon, Sierra Leone, Nigeria, Mali, Ghana, Ivory Coast, Guinea, among others[16].

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[15] In particular, Dr. Marta Maffia, who has taken them as a research reference since the late 1970s.

[16] In the last census of 2010, 2,738 Africans were registered out of a total of 1,805,957 foreigners, representing only 0.15%. It is possible that an

Consequently, during this stage, we broadened our field of observation and analysis from sub-Saharan African migration to 'Afro-descendant' presences. The latter included descendants of Cape Verdeans born in Argentina, Afro-Argentinians (descendants of the enslaved brought to the River Río de La Plata), those from other Latin American and Caribbean countries, such as Afro-Cubans, Afro-Peruvians, Afro-Brazilians, Afro-Uruguayans, Afro-Colombians, and Haitians, among others.

Based on these migrant dynamics in Argentina, and their relationship with the new visibilities of Afro-descendants located in the province of Buenos Aires and the Autonomous City of Buenos Aires (CABA), we developed two new projects, financed by CONICET and the Education Ministry of the Nation. Our aim with these projects was to learn about migratory trajectories; representations and construction of memories; forms of organisation; and delimitation, or construction, of ethnic borders between Afro-Argentinians and Africans, particularly the creation of an area of shared sociability. We wished to explore the relationships between the organisations formed by the first African migrants, such as Cape Verdeans, and those created by Afro-Argentinians and Afro-Latin Americans, This, while also analyzing their participation in the growing process of the Afro population visibilization, emphasizing the relationship established with the State and their regional and international connections. Finally, the projects focused on the problems related to discrimination and racism, political demands and collective actions led by certain activists in these struggles. Many outputs produced by the research team gave account of these issues, with varying degrees of depth. They were presented in periodical publications, books, congresses, and outreach activities.

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under-registration may have occurred due to several causes, such as entering the territory outside the current legal frameworks. For this reason, both the associations that group them and the community leaders estimate that there would be between four and five thousand sub-Saharan immigrants in Argentina, mainly Senegalese.

Stage Three: New visibilities and legal frameworks in the 2000s.
The next stage was characterized by the combination, and examination, of two research experiences which had been carried out in the same academic unit of the UNLP. One was concerned with Africans and Afro-descendants and took place at the Ethnography Division. The other, led by Dr. Liliana Tamagno and located at the Social Anthropology Research Laboratory, was concerned with indigenous urban migrants from the Argentinian Chaco. Thus, we expanded our interdisciplinary team by integrating researchers from Anthropology, and graduates of Political, Legal and Communication Sciences.

We took account of substantial previous research, both our own and that of other colleagues that affirmed the denial, invisibility and silencing of the indigenous and Afro-descendant component within the Argentinian population. We then paid attention to the new visibilities of these groups produced in recent years, whose demands reached, to a greater or lesser extent, the status of state policies. There are significant challenges that arise when attempts are made to translate such demands into public policies. The book, *Indigenous, African, and Afro-descendant people in Argentina. Convergences*, *divergences and challenges* (Tamagno and Maffia 2014), summarizes the main results of the research work carried out by both teams.

Stage Four: New otherness, visibilities, and relationships
Upon completion of this collective project, we observed new dynamics in some organisations of African migrants and Afro-descendants, which led us to focus again on our particular issue. We focused on aspects that needed to be deepened and problematized, such as associationism, transnationalism, social representations, social memory processes, social networks, ethnic identities, social movements, the formation of communities and diasporas, among others. Consequently, we moved on to the next stage of the research (2013-2016), with two projects aimed at delving into the '*New otherness, visibilities and relationships between organisations of sub-Saharan African migrants and Afro-descendants in the province of Buenos Aires and CABA*'.

Some members of the research group pointed to the Senegalese migrants, because they represent the majority of the collective of sub-Saharan African migrants who have become transnational agents between regions, linking new spaces of life mainly with the societies of origin. Other researchers in the team mostly referenced their work, though not exclusively, on Afro-descendants, emphasizing their political actions; creating associative and organisational spaces; mobilizing in the fight against discrimination and racism; vindicating blackness and self-representation. In the same way, the research was aimed at achieving the main objectives proposed in the projects, analyzing the processes of material and symbolic territorialization, expressed in the formation of associations and in the creation and recreation of shared social spaces, in the struggle for citizenship broadening. Also, our goals were to delve into the role played by African migrants in the visibilization processes of the Afro-descendant population of and in, Argentina, to analyze the social representations of the local society about Afro-descendants and African migrants, such as they are expressed publicly through the media, blogs, web pages, etc., and to understand the role of social memory processes and uses of the past as diacritics of ethnic marking/visibilization in both groups.

From the studies carried out during this stage, we chose nine works, which became chapters of a collective book called *Africans and Afro-descendants in Argentina. Practices, representations, and memories* (Maffia and Zubrzycki, coord. 2017). Ideas expressed in previous stages were included in that book, for instance, in relation to the organisations that group Afro-descendants and Africans. Although, at the beginning, they were created as an area of organized shared sociability, and an anchoring space for the construction of identifications based on shared origins and diasporic affiliations, we observed growing tensions and conflicts in internal relationships and between different groups. From the interaction between them, with the national State and other transnational actors, a variety of interests and points of view that collided with each other arose, making it difficult to carry out a unified project. These situations only express the diversity and dynamics of the relationships among social actors, of which the

conflict is part, albeit silenced for centuries. Later, we observed that many of these tensions were diluted with the creation of alliances between some organisations and their leaders, who constructed their own paths, 'parallel ones' that were, in some way, implicitly excluding. But we also observed, as a result of a deep follow-up in our field work, that in very specific circumstances, they converged in shared spaces.

Other chapters focused on the trajectories of the Senegalese migrants in Argentina and neighboring countries, how they were formed from accumulated experiences and social ties, interwoven with numerous actors from the group itself and from the host societies. All these accumulated capitals allowed them to shape, and update, solutions to certain conflicts in specific situations, which have developed even within the Southern Cone[17], and to favor the consolidation of transnational mobility and workspaces. In the book, we have also addressed the way in which state control and institutional racism in Argentina are faced, from the practices of some Senegalese migrants, based on the analysis of cases. Through this process, we were able to identify how thse migrants were able to use strategic and non-disruptive methods to influence State, NGOs, academia, and media to channel their demands and improve their situation in the country.

The research also focused on the formation of associative groups, organisations and spaces for interaction with Afro-descendants and African migrants and on the actions of their leaders as authorized voices, in the process of giving meaning to the sub-othered memories. Specifically, we analyzed commemorative spaces as privileged supports in the reconstruction of Afro memories, observing agreements, conflicts, and disputes in the discursive scenario, crossed by power relations.

Accompaniment, ethnographic ethics, and involvement

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[17] Geopolitical region made up of the countries of Argentina, Chile, Uruguay, Paraguay, Brazil and Peru, although the inclusion of territories may vary.

Throughout our research, crystallized in these and other bibliographic productions, the team members carried out the less visible work of accompaniment of the groups with which we constructed knowledge. On various occasions, conflictive situations arose between these groups and local security forces, government and the media, with illegitimate action of these institutions in workplaces, public roads and, occasionally, in the migrant groups' homes. This process of accompaniment is one that follows the ethical guidelines leading the ethnographic work. It is based on the conviction that working with other social subjects implies a commitment to find collective solutions to situations of oppression and inequality. In our case, it is about the experiences of people of African descent in Argentina, particularly the Senegalese migrants.

Through this ethnographic framework, we participated with Senegalese referents in cross-sectoral workshops, such as the Observatory Board for the Migrants' Human Rights of the Center for Legal and Social Studies (2011-2012); similar spaces in the Ministry of Justice, Security and Human Rights of the Nation (2016); and in the Provincial Commission for Memory (2017-2018); where the claimants, with some success claimed for their systematically violated labor, migration, and citizens' rights.

Stage Five: Leaderships of African and Afro-descendant migrants

A major goal of our research projects has been to contribute to providing a response, if only partial, to a range of issues such as the complex insertion of migrants in the host society; the articulation through associations; the link between migrant and Afro-descendant associativism; the role of leaders and Afro activists in the demand for public policies; the restitution of citizen rights; the questioning of the 'official' story; and the irruption of new pasts and dynamics of Afro-state interaction. This involved focusing on the actions of those subjects with greater decision-making power, particularly within associative spaces, subjects who held a situation of power over the definition of meanings and practices, from institutionalized positions and from both formal and informal ones. This is how the leadership role of African and Afro-descendant migrants acquired centrality,

both within the institutional bond they represent, as well as in the configuration of 'policies of difference' (Restrepo 2013)[18].

Both the empirical data and a corpus of theoretical issues led us to some important and intertwined questions, such as: How and why do some subjects acquire a position of influence within the group? Are personal qualities, such as ambition and decision-making capacity, Max Weber's 'charisma' (1964) central? Is training, experience (associative, professional, political, oratory, etc.), the 'militant capital' (Matonti and Poupeau 2004), a factor of those occupying a prominent place in the choice? How do social factors and the 'structure of opportunities' fit? How is the collective bond with the institutional project they represent produced? Some of these questions gave rise to new team projects about the construction and configuration of leadership in the African and Afro-descendant populations in the province of Buenos Aires and CABA[19]. In this sense, we understood leadership, not as a static phenomenon as it was traditionally thought of in its early days, but rather as dynamic and relational, socially, culturally, and historically situated, and subject to power relations operating in the social context. This is a recent and developing line of research, novel in the field of migration anthropology in Argentina.

As discussed in Stage One, this research has allowed us to provisionally create a map where formal and informal organisations, individuals, NGOs, the State, etc. are represented. These bodies align, oppose, merge and divide, forming a complex relational scenario, with numerous tensions and dynamisms. it is there that we focused on the role of certain subjects whose performance on these dynamics was decisive.

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[18] Understood in a broad sense, it refers to the "grid of intelligibility that makes difference thinkable, thus giving it its historical existence and making certain positions possible." (2013: 159). Governments and state institutions, social movements, organisations, NGOs, the academic establishment, and expert knowledge take part there, as well as the dissimilar social imaginaries of the population.

[19] Financed by ANPCyT and CONICET.

Some of the first results, in particular those referring to Senegalese migrants, show us that their leaders play important roles in the migration context, standing out as the main interlocutors and mediators with state authorities, diplomats, NGOs, migrant organisations and media, among other actors. They are activists, committed to the rights of migrants, and also protagonists in the fight against racism in Argentina. Hence, they hold a central position when it comes to thinking about public policies that include them, and the need to generate knowledge about and together with them.

Likewise, we delved into the role of African migrant women in the associative dynamics and the possibility of assuming leadership positions, particularly through the association Unity is Strength', in Wolof[20] '*BokkNekkBenn*'. This association was created as a *tontine*, a very frequent type of grouping among Senegalese women, both in the country of origin and in migratory contexts. It is made up of married women of the Wolof ethnic group who live mainly in the Province of Buenos Aires. The main objectives of this association have been to set up a collective saving system and access to financial aid and loans. It has also functioned as a space for listening and for emotional support among its members.

Participatory research and university extension processes
Continuing with the Senegalese migrant referent (between 2018 and 2020), we got involved in two processes of Participatory Action Research (PAR), as a 'study and action method (…) to obtain useful and reliable results in the improvement of collective situations, especially for the popular classes' (Fals Borda 2009: 320) and to engage in collaborative ethnographies[21], within the

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[20] Wolof is a language spoken in Senegal of the Niger-Congo family.
21 We incorporate the contributions of Álvarez Veinguer and Sebastiani (2018), who propose to transcend the individual ethnographic model by integrating construction practices of non-academic knowledge, to give centrality to the processes of political subjectivation and to care and emotions and finally, to deploy methodologies that transform and overflow research methods. And those of Rappaport (2021), when he

framework of two multi-sectoral assemblies in the City of La Plata. The establishment of these assemblies came about as a response to tensions between the Senegalese vendors and the government management of the City, especially the repression and systematic persecution of the group. The first assembly took place in 2018 and was self-entitled 'Assembly for the Rights of Migrant Workers'. Two years later 'Anti-racist Awareness' (Agite Antirracista) emerged. Some of the common objectives of both spaces were to build a non-criminalizing view of Senegalese workers (in general) and their referents (in particular); to create spaces in which their testimony was heard with a view to denouncing repression by the municipality and local and provincial police; and to promote spaces of political subjectivation for all the participants of both assembly meetings. In these organisations, inter-epistemological knowledge construction processes were developed, in which migrants, especially community referents, had a leading role in activities and decision-making, thus moving them beyond the frequently attributed, conceptualized roles of 'research objects' or 'key informants' (Fals Borda 1981). Other members of the assemblies were lawyers, researchers, civil organisation representatives, social workers, journalists, anthropologists, cultural workers, UNLP students, and independent individuals.

With regard to implemented activities of these bodies, in 2018, we, members of the 'Assembly for the Rights of Migrant Workers', conducted a municipal survey of Senegalese migrants. We put in place a bilingual protocol (Wolof/Spanish) regarding the arbitrary arrests of street workers and established workshops for the rights of Senegalese. A public presentation of the protocol was subsequently held in the city center (Voscoboinik and

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states that it is not possible to define PAR or collaborative ethnographies in a closed and complete way, because they emerge in particular work contexts.

Zubrzycki 2019). In 'Antiracist Awareness'[22] we recorded a 'Virtual Festival for the Rights of Senegalese Migrants in the City of La Plata'. We also recorded a cycle of interviews with testimonies of informal workers, who would be adversely affected by the implementation of a new code of coexistence in the city of La Plata[23].

Finally, during 2019, we participated in a University Extension project[24], aimed at working with the community outside of the University and the Academy. In this case, our action focused on holding meetings with high school students to reflect on concepts such as 'ethnic diversity' and 'racial diversity', among others.

As a conclusion

Throughout this work, it has been possible to observe how, despite personal interests and insertions within the academic field, we have managed to form an interdisciplinary research group, with an extensive and uninterrupted trajectory in the study field of the diversities of African origin in Argentina. Our different trainings within the field of human sciences (social anthropology, psychology, sociology, geography) have allowed us to develop an enriching dialogue, both within the group and

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[22] Anti-racist Awareness (Agite Antirracista) was the second self-convened assembly that was formed to address the problems of Senegalese migrants. It developed activities during the pandemic. Three Senegalese referents participated in the meetings, although one of them played a central role as community leader in decision-making in relation to the objectives and tasks to be developed. The assembly also had people from the areas of social communication, social work, anthropology, audiovisuals and cultural workers.

[23] The virtual activities were shown on the assembly's social networks: Instagram and Facebook: "Agite Antirracista"; The festival was also broadcast on YouTube channels: "ToubaArgentine TV" and "Somos Plurinacional".

[24] The University Extension within the UNLP represents an institutional tool with its own budget. It is defined as the "construction of two-way knowledge" (UNLP 2008), a process in which producers and recipients alternate the role of "teachers" and "students".

with other teams of colleagues. This has allowed us to break down some conceptual and semantic barriers, as well as preconceptions, in the search for responses to the stated objectives. This created a reflective process, which was a permanent feature of the team's work, both in relation to the theories and concepts used, and to the methodological approaches taken. With regard to those approaches, we have had some concern about some of the training and teaching practices in methodological subjects, particularly in relation to the role of the researcher and the study subjects. We have identified a need to review assumptions about the production of knowledge from ethnographic practice and on the scope of this knowledge. That is why, in recent years, we have moved towards a positioning that understands our interlocutors as active subjects, capable of theorizing and participating in the production of legitimated knowledge.

In short, we have developed an extensive research work that has contributed to the field of studies on Afro-descendants and African migrations, in the local and regional academic sphere. However, in doing this, we have also assumed an ethical and political position that forces us to reflect on the impact and uses of this knowledge in a troubled context of demands for public policies and recognition.

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8. Social Security Exclusions in the Wake of a Deadly Covid Pandemic: Narratives of Migrant Domestic Workers in South Africa

Janet Munakamwe

Introduction

The chapter presents and considers crucial methodological considerations in the analysis of migration to South-East Europe. In the context of new migration flows, that are by now becoming dominant forms of movement, previous research inadequacies are being shown up. The problematic emphasis on immediate policy recommendations, as well as the proliferation of articles in a 'publish or perish' academic culture, have resulted in a well-documented inability to produce valuable and consistent migration research agendas. These, we argue, require a set of theoretical assumptions that acknowledge the following. *Firstly*, migration is a long process, the analysis of which requires a holistic understanding of events and changes occurring in the countries of origin, in intermediate countries, and lastly, in host societies. The continuing emphasis, solely on this last part of the process, often leads to weak explanations and poor policy recommendations. *Secondly*, while the research focus may differ, the attribution of methodological weight to the values and beliefs of migrants, adds value and sheds light on the effects of these long migration processes on the subjects themselves. To illustrate our argument, we present a set of theoretical and methodological suggestions that concentrate on theories of the middle range and qualitative participatory methods.

In this chapter, I explore the ways in which existing state-crafted social protection policies, particularly social security, in South Africa, inherently exclude the 'subaltern'[25]. I then go on to examine how such workers have taken the opportunity created by the Covid-19 pandemic to challenge these oversights, thus

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[25] These include workers in non-standard employment, informal economy, casuals, seasonal, migrants and asylum-seekers

leveraging institutional power offered by the national Constitution. Migrant rights organisations (MROs) have been at the fore of the struggles for inclusion, underpinned by practical solidarity from local international agencies such as the International Labour Organisation (ILO), as well as local civil society groupings. The chapter pays particular attention to migrant domestic workers, who provide the much-needed social reproductive care in private homes. Yet, they face discrimination in multiple ways at the intersection of gender, class, race, ethnicity, and nationality. Domestic workers constitute a significant part of the global care economy which is located within the informal economy. Yet, they are among the most at-risk workers. By law, all workers ought to be covered by a universal and contributory social security fund, the Unemployment Insurance Fund (UIF) which provides cash benefits in times of unemployment, maternity, adoption, illness, and death. Despite this, a large proportion of domestic workers are not officially registered with the relevant government department, although some employers deduct the statutory contributory 1 percent from monthly wages. This lack of registration means that, under the Unemployment Insurance Act law, they are ineligible for social security protection and precluded from accessing benefits in times of need. It is noteworthy that the fight for recognition, dignity, and inclusion of domestic workers in labour laws for social protection dates back to the apartheid epoch, and still persists under the democratic dispensation. While all domestic workers are vulnerable, it is worse for migrants who do not qualify for alternative state social grants offered to indigent citizens. Essentially, the collective agency elicited by migrants during the country's hard lockdown resulted in instantaneous policy shifts to extend the scope to migrants and asylum seekers, albeit upon meeting certain conditions. Thus, the COVID–19 pandemic has not only laid bare the intersectional layers of exclusion in social security, but has also unlocked migrants' agency, including local and global solidarities.

In this chapter I adopt a methodological approach that includes documentary analysis, participatory active research, in-

depth interviews with the leadership of domestic workers and shadowing online social media platforms such as WhatsApp and Facebook. It features some empirical data from my doctoral thesis (Munakamwe 2018) for which I undertook extensive desk research, review and ethnography. In addition, it draws from contemporary fieldwork in the wake of the deadly pandemic. I shadowed, and at times actively participated[26], in advocacy work that informed the foregoing social protection policy shifts.

Exclusion in a time of pandemic

The unprecedented global COVID-19 pandemic has laid bare gender gaps in social protection policies across the globe which have further deepened socio-economic inequalities, particularly among vulnerable workers who fall outside standard employment. Furthermore, the national lockdowns in many countries exposed deficits in state-crafted social protection policies, including weaknesses in enforcing social security statutory provisions. This was the case in South Africa, which is hailed for its constitutional democracy, that is somehow incompatible with national labour, migration, and social policies. Providentially, the country still upholds its constitution in such a way that remedies related to socio-economic violations are sought through litigation processes. For example, the Constitutional Court, *in Khosa v Minister of Social Development* (2004) found, that the citizenship requirement, in relation to migrants and refugees' access to government social grants, was unconstitutional and ordered that 'permanent residents' be included under the provisions. More recently and more pertinently, in June 2020, in response to a lawsuit filed by the *Scalabrini Centre[27] v Minister of*

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[26] In my positionality as a migrant living and working in South Africa and also working with diverse migrant communities

[27] This is a civil society organisation (CSO) that provides specialised services for refugee, migrants including asylum seekers and South African communities.

Social Development, the Pretoria High court ruled that some asylum-seekers and special-permit holders could apply for the Covid-19 Social Relief of Distress (SRD) grant. Later that year, November 2020, in the case of *Mahlangu v Minister of Labour,* the South African Constitutional Court found that the exclusion of domestic workers employed in private homes, from the Compensation for Occupational Injuries and Diseases Act (COIDA) was unconstitutional (see Munakamwe and Gwenyaya, 2019). The court ordered that this category of worker be covered immediately, and with retrospective application dating back to 1994, when the democratic dispensation came in.

The outcomes of these court challenges point to a strong institutional power, albeit alongside constitutional deficits, in application of social protection policies in South Africa. Social policies cover a broad spectrum of issues that include social grants and social security, and this chapter pays particular attention to the latter, which is a universal labour right for all workers. The pandemic has given workers and trade unions an opportunity to resuscitate the conversation on social security, the universal basic income grant (UBIG), maternity protection and medical cover for those who fall outside of standard employment. This is particularly relevant to domestic workers who, due to working primarily in the informal economy, are expressly discriminated against and excluded from numerous social protection policies. This is exacerbated by the under-representation of domestic workers in the tripartite social dialogue and collective bargaining systems. These layers of exclusion are faced by a cohort of workers who are already extremely vulnerable and subject to social exclusion on the basis of ethnicity, citizenship and migration status.

Context

While the constitution of South Africa grants universal socio-economic rights to all who live in the country, in practice economic migrants and asylum seekers are structurally excluded from the national social protection policies as are vulnerable workers in non-standard economic sectors, such as domestic, agriculture, retail, hospitality and casual work. South African

citizens, can avail of alternative provisions in the form of social grants for children, the elderly and those with disabilities (Munakamwe, 2021a). There are approximately two million workers in the informal economy who include street vendors, waste pickers (see WIEGO, 2013b) and domestic workers, of whom approximately 60 percent are female. Women in these sectors are not eligible for maternity benefits either (see ILO Convention 183 on Maternity Protection). As it stands, social security takes a gender-neutral approach and is biased towards the formal economy which is predominantly male. This undermines the intricate link between social reproduction borne by women in private households, and capitalist productive work. According to Fraser:

> the rise of capitalism intensified [this] gender division—by splitting economic production off from social reproduction, treating them as two separate things, located in two distinct institutions and coordinated in two different ways' (Fraser, 2016: 1).

Workers in the informal economy, predominantly women and cross-border migrants (see Chen, 2004), have been effectively excluded from accessing social security through the Unemployment Insurance Fund (UIF). The Unemployment Insurance Act (UIA) established the Unemployment Insurance Fund (UIF) which operates on a contributory basis, with both the employers and the employee contributing 1 percent (Munakamwe, (2021a). This insurance funds serves as an economic safety net in times of unemployment, illness, maternity, adoption and dependent's benefits. Conversely, alongside this, the Social Assistance Act actually restricts social grants to South African citizens only. This has been extended to permanent residents and refugees subject to meeting certain conditions following the court ruling in *Khosa v Minister of Social Development 2020*, as mentioned earlier (Tanzer and Gwenyaya, 2018). Moreover, the unemployed asylum seekers and those regularised under special dispensation permits (Angolans, Basotho, and Zimbabweans) were later included, following the Pretoria High

Court ruling of that same year. Migrant domestic workers constituted a distinct population group that was also excluded from accessing the UIF, primarily because they were not registered with the Department of Employment and Labour (DoEL), a pre-requisite for one to claim this insurance fund. There were some some migrants who made the relevant contributions but were not registered with the DoEL, and therefore excluded.

The coronavirus pandemic and the consequent lockdowns, dating from March 2020, laid bare a socio-economic lacuna in the labour law of South Africa. The exclusion of asylum seekers and special-permit holders from social security and the Covid-19 SRD Grant came under the spotlight during the national lockdown. This was after the Scalabrini Centre[28] filed a lawsuit in May 2020 at the Pretoria High Court against the Minister of Social Development[29]. Prior to the court ruling, the special Covid-19 SRD grant of an amount of R350 approximately (US$23) per month was exclusively available to South African citizens, refugee status holders, and permanent residents only. In June 2020, the court ruled that some of South Africa's asylum-seekers and special-permit holders would be eligible to apply for the Covid-19 SRD grant provided that; their documentation was valid at the time the National State of Disaster was declared and subject to the South African Social Security Agency's eligibility criteria – they cannot be receiving an income or any other form of grant, or any economic relief from UIF[30]. This resulted in a swift policy shift to embrace all who live in South Africa in the spirit and letter of the national Constitution. It remains to be seen if this short-term policy response will translate into an Act of Parliament

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[28] The Scalabrini Centre of Cape Town is an NGO based in Cape Town that provides specialised services for refugee, migrant and South African communities.

[29] See: https://scalabrini.org.za/news/press-release-scalabrini-launches-urgent-litigation-on-covid-19-social-relief-of-distress-grant/

[30] See: https://scalabrini.org.za/news/victory-in-covid19-social-relief-grant-court-case/

in future, but the precedence set by the case will undoubtedly shape future responses to national disasters.

Socio-economic outlook at the intersection of social protection policies

South Africa is one of the most unequal societies in the world. Structural economic issues are so severe that a large share of workers regardless of nationality are exposed to social inequalities in their everyday working lives. A range of well documented socio-economic and political factors shape its responses to social policy including international migration. For many years, despite the ushering in of the democratic dispensation, the country has been haunted by the triple challenges of poverty, inequality and unemployment. In a way, these structural problems present impediments in upholding the principles and provisions of the Constitution as well as implementation of social, labour and migration policies. The triple challenges have been exacerbated by the COVID-19 pandemic.

The pandemic also exacerbated the existing unemployment crisis, as many lost jobs during national lockdowns. The global economy was projected to contract by 4.9 percent due to the adverse effect of the pandemic while in Sub-Saharan Africa the economic activity was projected to contract by 3.2 percent from a positive out-turn of 3.1 percent in 2019. Meanwhile statistical data from the quarterly labour force surveys of 2020 pointed to decreasing trends in unemployment, these figures are highly contested. Incredibly, the data shows that the unemployment rate fell to 23.3 percent in the second quarter of 2020 from 30.1 percent in the previous period, the lowest jobless rate since the second quarter of 2009. It is clear that the country's strict lockdown distorted labour force numbers with fewer people actively looking for employment[31]. In contrast to this, the Business

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[31]Miyelani Mkhabela. "Unemployment rate decreased amidst of 2.2 million job loses". https://www.iol.co.za/business-

and Human Rights Centre revealed that three million workers lost their jobs as a result of the Covid-19 pandemic while, of those who managed to keep their jobs, 1.5 million did not have an income[32]. Of particular concern is the alarming high rate of unemployment among young people during that time, as revealed by Statistics South Africa (StatsSA) in June 2020:

> The results of the Quarterly Labour Force Survey (QLFS) for the first quarter of 2020 indicate that employment decreased by 38 000 to 16.4 million and the number of unemployed persons increased by 344 000 to 7.1 million. As a result, the official unemployment rate increased by 1 percent to 30.1 percent, compared to the fourth quarter of 2019. The rate has been persistently high over time with the youth (aged 15–34 years) being the most affected by joblessness[33].

In response to the economic hardships presented by the COVID–19 induced hard lock down, the government of South Africa introduced an economic stimulus package of five hundred billion Rands. Corporations and humanitarian organisations also set up an independent Solidarity Fund. The Fund aimed to complement the UIF and provide a cushion to business, workers, and poor citizens against economic distress. It was administered by the Department of Social Development which also contributed a further R400 Million to the Fund, specifically towards food security[34]. Small-scale and medium enterprises (SMEs) received

report/opinion/unemployment-rate-decreased-amidst-of-22-million-job-loses-49906db6-444a-4af6-a5dc

[32] Business and Human Rights Centre. "South Africa: Three million South Africans have lost their jobs as a result of the Covid-19 pandemic, women most affected". 16 July 2020 https://www.business-humanrights.org/en/

[33] http://www.statssa.gov.za/?p=13379

[34] The Solidarity Fund partnered with non-governmental organisations (NGOs) and migrant-rights organisations to distribute food parcels to

once off capital injections to cover lost income and to ensure sustainability beyond the lockdown. It was also used to boost the existing social grants scheme and established a temporary social relief grant to support the unemployed.

To a large extent, migrants were initially excluded from the pandemic support measures. Some, who were lucky enough to be registered with the DoEL, managed to claim through the mainstream UIF. But even some of these were excluded on technical grounds, such as not having the '13 Digit national identity card' (although the system was later programmed to accommodate passport and refugee permit holders). As stated earlier large numbers of migrant workers were not registered with the DoEL and theredore were not eligible for UIF. Domestic workers were particularly impacted as they were, effectively, unable to register. Therefore, they depended on charitable organisations for assistance. Following the Scalabrini Center Constitutional challenge, some asylum seekers and permit holders were given the right of access to the temporary COVID–19 relief grant, as long as they fulfilled certain criteria. Interestingly, a brief survey of this cohort through WhatsApp groups revealed that of those who attempted to claim, none were successful.

Meanwhile, the excluded domestic workers were allowed to claim benefits through the Temporary Employer-Employee Relief Scheme (TERS) which was introduced as an alternative gateway to UIF under lockdown. It was targeted at those who were not registered with the DoEL and claims were made through employers.

A reflection on Domestic work and global care work
Domestic workers comprise a significant part of the global workforce in informal employment and are among the most vulnerable groups of workers. Globally, women are affected if social services are not provided as most of these services are

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indigent population groupings such as the homeless, refugees and vulnerable workers particularly domestic workers.

relegated to the 'private sphere' where women are responsible for social reproduction. If the state fails to provide health care services or childcare facilities or nursing homes, or rehabilitation centres for the disabled, the burden bounces back to the households, where there is heavy reliance on women's unpaid care work (see Munakamwe, 2008). Where women within households engage in paid work, very often domestic workers are hired to provide services within the home.

The burden of care work has increased in the wake of the pandemic, yet remains undervalued and underpaid. As Hester (2018) asserts, 'care under capitalism will remain under-recognised, undervalued and underpaid'. It is estimated that there are 67 million domestic workers worldwide (ILO, 2018: Munakamwe and Gwenyaya, 2019) and this accounts for between 4 and 10 percent of the total workforce in developing countries, and 1 to 2.5 percent in developed countries (WIEGO, 2013b). Globally, the sector is comprised of approximately 96 percent women, with significant numbers of these being migrant, and a perturbing number being children. Marchetti cited in De Villiers and Taylor (2019) contends that the entrance of post-colonial women in the niche of paid domestic work is crucially conditioned by the colonial past, not only in structuring personal contacts and networks that facilitate their entrance into the niche, but also in affecting the representation of those skills that are considered necessary to access the labour.

In South Africa, approximately one million people, mostly black women from marginalised backgrounds, are employed as domestic workers by predominantly middle-class families, constituting 6.2 percent of the country's workforce (Munakamwe and Gwenyaya, 2020; Oxfam Report, 2018; ILO, 2018). Some are employed as full-time domestic workers and live on the premises of their employers, usually in backyard rooms while others live out. A large proportion of domestic workers are also employed on a part-time or temporary basis, where they work on various time and wage schedules for different employers. This has resulted in not only a representation gap but also a high wave of economic insecurity. The lack of employment contracts, poor wages and social security deficits reinforce racial, class and

gender inequalities of domestic work. The prime challenge with domestic work is that the relationship between employers and domestic workers is characteristically personal and unequal. Where domestic workers are considered as 'part of the family', employers have the power to provide or withdraw support as they please. Employers may provide gifts and bestow kindnesses and care to elicit harder labour and 'favours' from domestic workers. This, in turn, can have the effect of creating a hostile employment relationship when expectations are not met by that worker. In essence, the 'paternalistic' nature of the employment adds to the exploitative conditions of domestic work.

While 'invisible' (Ally, 2005), due to the nature of their workplace being private homes, domestic workers have been at the frontline of the pandemic, providing much-needed care for the frail, elderly, children and the disabled. Yet domestic workers were also hard-hit by the pandemic, suffering reduced hours and, in other cases, losing jobs altogether. As already stated, many were not covered by the social protection arrangements put in place to support those impacted by the pandemic restrictions and lockdowns. For migrant domestic workers, the situation was exacerbated by restrictive immigration laws and policies that forced many into 'irregular' migration status. According to the ILO Report of January 2021, a large share of women lost jobs and income while cases of gender-based violence escalated. The sad reality is that, despite the improvement in workers' rights in recent years, domestic workers still face pretty much the same challenges as before as their material conditions continue to deteriorate in the shadow of the Covid pandemic. Gains have been made in some areas such as the adoption of the ILO Conventions 189 and 190 to protect domestic workers from unfair labour practices including gender-based violence (GBV). However, some of these gains have now been rolled back.

Social Security at the intersection of Migration policy and laws
In South Africa, there is a high level of international migration, although there is dearth of statistical data on numbers due to individual and clandestine migration (Munakamwe, 2018), and a huge backlog in the asylum application system. Migration is

viewed as the inevitable outcome of globalization and the spread of capitalism, and the world is increasingly experiencing the movement of people across borders in the form of political and economic refugees. Labour migration to South Africa is one of the key defining features of the southern African region and is triggered by factors, both political and socio-economic (Crush, 1997; Sachikonye, 1998; Taylor, 1981). More recent factors accounting for migration include, on the one hand, a desperate need for medical care (see Vearey, 2017), and on the other, labour market demand for skilled and unskilled labour in certain sectors like engineering, medicine and agriculture (see Munakamwe, 2021b; Segatti, 2014; Munakamwe and Jinnah, 2014).

Owing to the over-dependency on migrant labour over the years, clandestine and informal migration continues as workers and their families from within the region rely on remittances whilst at the same time, labour sending countries' economies continue to decline (see Coplan and Thoahlane, 1995). Expressing concern over regional inequalities, Davies and Head (1995) assert that 'the prospect of escalating clandestine migration is interpreted as a real or potential threat which underscores the need for an equitable and mutually beneficial programme of regional economic co-operation' (1995: 202). During apartheid, women were allowed to migrate to South African cities only to provide domestic services in private homes and the major supply country in this sector was Lesotho (see, Coplan and Thoahlane, 1995). Today, large numbers of women are migrating independently, resulting in large numbers of undocumented, and thus particularly vulnerable, migrants engaged in domestic service (Dodson, 1998).

According to Makoro (2015), up to half of the female migrants from Lesotho are domestic workers in South Africa. In the post-apartheid labour regime, employment opportunities in traditional sectors such as mining, agriculture and manufacturing have dwindled (Seidman, 1995; Crush, 1997). Conversely, the domestic work sector continues to expand as many middle-class women engage in paid employment. In the post-migrant labour regime, the sector has created job opportunities for both highly skilled (job mismatches) and low-skilled migrants (see

Munakamwe, 2018). Migration laws directly impact the contractual terms under which migrants are employed. This frequently means being employed on short-term contracts with contract renewal and the overseeing of immigration status resting with the employer (Munakamwe, 2018). This means it is the responsibility of the employers to register their employees for the UIF. As in many migrant receiving countries, South African migration laws and policies, including the work permit regime, are biased towards the highly skilled. This results in those in low-skilled and unskilled categories, such as domestic labour, being undocumented from the off and thus being highly vulnerable.

Social protection policies historical trajectory in contemporary South Africa

Social policy deficits in South Africa can be traced back to the apartheid system economic structural adjustment programme (ESAP). From the early 1980s to the 1990s the World Bank and International Monetary Fund (IMF) imposed neo-liberal policies as strategies to cut down on state expenditure and poverty reduction. This involved the introduction of social protection strategies as a way of saving low wage income earners and other marginalised groups from falling into poverty traps. Many Sub-Saharan African countries adopted these policies with a view to reducing poverty. The policies failed dismally and instead, further entrenched poverty and inequalities in many countries as they became entangled in debt traps. Ultimately, they resulted in the collapse of many economies. Furthermore, the blanket approach to social policy failed to acknowledge gender disparities and dynamics.

In post-apartheid South Africa, the government has made significant legislative and policy progress to redress some historical socio-economic injustices and disparities wrought by apartheid, particularly on social policy for the majority Black households. Social security is enshrined in South Africa's Constitution, labour laws, regional protocols and in International Labour Organisation (ILO) conventions. South Africa is a signatory to some of the statutory frameworks in place at international, regional, and national levels. Article 9 of the

International Covenant on Economic, Social and Cultural Rights (ICESCR), recognizes the right of everyone to social security, including social insurance, as being of 'central importance in guaranteeing human dignity for all persons when they are faced with circumstances that deprive them of their capacity to fully realize their Covenant rights'. The ILO values social security as a fundamental universal right for all workers (Munakamwe, 2021). Thus, in 1952 the Organisation adopted the Social Security (Minimum Standards) Convention (No. 102), which 'is the flagship of all ILO social security conventions, as it is the only international instrument, based on basic social security principles, that establishes worldwide-agreed minimum standards for all nine branches of social security'. Likewise, the Southern African Development Community (SADC)[35] charter on fundamental social rights and the SADC code of social security also prescribes guidelines on social security benefits for workers. In compliance with the national and international statutory requirements, the South African Constitution provides that 'everyone has the right of access to social security, including, if they are unable to support themselves and their dependents'. In this regard, the democratic government developed a social security system that comprises three pillars: non-contributory schemes, mandatory social insurance and voluntary insurance. The non-contributory scheme includes child, old age and disability grants, complemented by various forms of public work programs; the mandatory social insurance scheme includes the contributory Unemployment Insurance Fund (UIF); and the voluntary insurance includes pension schemes. In their

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[35] The Southern African Development Community (SADC) is a Regional Economic Community comprising 16 Member States; Angola, Botswana, Comoros, Democratic Republic of Congo, Eswatini, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Tanzania, Zambia and Zimbabwe. Established in 1992, SADC is committed to Regional Integration and poverty eradication within Southern Africa through economic development and ensuring peace and security.

discussion paper titled 'Covid-19 and Mixed Population Movements: Emerging Dynamics, Risks and Opportunities', the UNHCR and IOM (2020) noted that the struggle for survival by refugees and migrants outside their own countries has intensified, much as the socio-economic consequences of the pandemic and containment measures are felt.

Unions' collective bargaining deficits and the demise of the principle of 'An injury to one is an injury to all'

The pandemic exposed the fragmented solidarity among the working-class poor as South Africa's trade unions, unlike before, focused on fighting for their members' economic benefits within standard employment structures, while turning a blind eye to the plight of the unorganised workers. This is despite the rhetoric of 'An injury to one is an injury to all'. Hamilton noted that 'the level of unionisation has declined from 46 percent at its height in the 1990s to 26 percent [at the time of writing] …74 percent of workers are not unionised" (2017: 5). Organised labour paid particular attention to the needs of its membership who pay monthly subscriptions.   This could be due, in part, to their over-dependence on monthly subscription for their own financial sustenance. While local domestic workers unions were not selective in their approach, they are poorly resourced, with little support from the industrial unions. Social security packages that were provided by the government in response to the pandemic were largely directed towards those in standard employment, excluding migrants and citizens working in the informal labour market. This points to a form of nationalism, with the primacy of the formal economy over the informal economy and its migrant labour workforce (Munakamwe, 2021a).

There are two unions who work with domestic workers: the South African Domestic and Allied Workers Union (SADSAWU); and the United Domestic Workers of South Africa (UDWOSA). SADSAWU was formed in 1986:

from the merger of several locally based organisations, with 300 delegates attending its founding Congress. SADWU joined COSATU in 1986, by which time it had

approximately 20,000 paid-up members, 50,000 signed up members, 50 full-time organisers and 14 offices. At its height the union serviced an estimated 350,000 workers. Financial support was received from a number of foreign NGOs, much of it from the Interchurch Organisation for Development Co-operation (ICCO) in the Netherlands. Money was also raised from subscriptions collected (Mullagee, 2011:15).

UDWOSA was launched on International Domestic Workers Day, 16 June 2018. It's founder and President was a former provincial organiser for SADSAWU and a member of its National Interim Committee. UDWOSA subscribes to Pan-Africanism with a long-term vision to organise domestic workers across the African continent. Since its launch, the leadership has been championing the rights of all domestic workers, regardless of nationality. It played an instrumental role in ensuring that migrant domestic workers received the necessary material support from the ILO and other humanitarian organisations during the national lockdown. It was also 'part of the historical victory that we saw at the Constitutional Court' [36]on COIDA (the occupational injurues act) in 2020. The UDWOSA President was involved in this struggle while she was still part of SADSAWU and brought the case to the attention of the union.

Both these unions have long struggled for formal recognition and registration as fully representative industrial relations bodies with collective bargaining rights, but this has been denied them, giving them limited bargaining power within the existing framework. They are compelled to rely heavily on litigation and institutional power provided by the Constitution as vehicles to fight for rights for domestic workers demands (see Mullagee, 2011). Furthermore, Ally (2008) argues that the unions in the sector are reduced to 'extensions of the state's machinery to implement SD7 by doing information dissemination on behalf of

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[36] Interview with Pinky Mashiane, the Founder and President of UDWOSA. 09.09.21. Online: WhatsApp Chat

the Department of Labour, or else serving as referral centres to the various government agencies' (2008: pp. 6-14).

Both unions 'preach' unity and sisterly solidarity and work closely with migrant rights' organisations in this regard. The leadership are committed to challenging the divisive nature of neoliberal capitalism, which pits workers against each other on the basis of citizenship status. The new democratic dispensation has eroded solidarity among workers as locals feel their job opportunities are being reduced by the presence of migrants who they accuse of 'stealing' their jobs (see Barchiesi, 2011). Moreover, the adoption of wage labour as a key component of the developmental discourse among political and union elites in the post-apartheid period exacerbated an exclusive sense of entitlement based on citizenship. Barchiesi (2011) documents some of the 'side effects' of this sense of entitlement based on a glorification of waged work as central to the national democratic revolution. In particular, he shows its impact on gender relations and migrant workers. Interviews conducted among South African workers reveal specific resentment at the presence of the 'industrious alien' as Barchiesi observes:

> …in a time when stable jobs dwindle, trepidation about alien intrusions reconfigures citizenship in a signifier of belonging and exclusion. In a sort of deformed mirrored image of the official work-citizenship nexus, turning immigrants into scapegoats regressively validates the status of the worker as a member of the national community (2011: 232).

Xenophobia, primarily driven by competition for jobs, is pervasive in South Africa (see Misago, 2011; Segatti and Landau, 2008; Lehure, 2008). While the migrant domestic worker is somewhat shielded from this in their workplace, it being the private home, it manifests itself in communities, such as Black townships, where locals and migrants share space. It is also expressed in the form of inflammatory public pronouncements by political leaders. For example, in the midst of the 2020 national lockdown, the then Minister of Finance stated that over 90 percent

of those working in service sectors such as hospitality and domestic work were migrants and that this would change in the post-Covid economic recovery phase to make way for locals. In another episode, a former mayor blamed migrants for the failure of the city to properly implement its social housing strategy. However, studies revealed that the beneficiaries of the social housing scheme had actually rented or, in some cases sold, their houses to foreign nationals. Such statements, in a situation where many domestic workers have been on the housing waiting list for years, are inevitably going to create divisions between locals and migrants.

The ILO and Migrant Rights Organisations' (MROs) Interventions for domestic workers

The ILO recognizes social security as a fundamental universal right for all workers and has enshrined this right in its 1952 Convention, as discussed above. The Universal Declaration of Human Rights (UDHR) of 1948 asserts that every Member State of the United Nations (UN) 'must affirm and reaffirm in good faith fundamental human rights and dignity worthy of its citizens, promote social progress and better standard of living for all' (UDHR, Article 23, 1948]. Member states are required to translate these international and regional instruments into domestic laws.

The ILO was aware of the vulnerability of domestic workers in South Afica during Covid lockdown. It recognised that their exclusion from statutory social security legislation and policies such as the UIF put them and their families at serious risk. The ILO Pretoria office intervened with the establishment of a fund to provide short-term grant-aid to regular and irregular migrant domestic workers to cover lost income. This process was facilitated and administered by a number of migrant-rights organisations. These included: The Africa Diaspora Workers Network (ADWN), a research and capacity-building organisation that promotes the rights of migrants and their organisations; Isolated Women in South Africa (ZIWISA) and UDWOSA, a local union that organises domestic workers. These organisations came together and established a platform to seek collective solutions to

address social, economic and human rights deficits under lockdown. A number of other MROs also participated: Izwi Domestic Workers; Migrant Workers of South Africa (MIWUSA); Disabled Migrants Rights Networking Organisation (DMRNO); Migrant Workers` Association South Africa (MWASA); Southern African Women's Institute for Migration Affairs (SAWIMA); Rising Women, Malawi Movement of Advocacy Group in Southern Africa (MAGSA); and Zimbabwe Integrated Platform (ZIP). Through their co-operative action, they sourced and provided humanitarian aid in the form of food parcels, blankets and other essentials to domestic workers who lost their jobs during the lockdown. After the lockdown, the ADWN and ZIWISA also provided for skills training for unemployed domestic workers.

Unlocking agency among domestic workers
The experiences of migrants under lockdown triggered agency and self-organising among this group. The focus shifted from professional representative organisations, such as unions, to alternative worker-oriented organisations which offer more direct and targeted support such as shelter, psycho-social services, humanitarian aid and free legal aid. These organisations include the Covid-19 People's Coalition[37]; the Scalabrini Centre; the Legal Resource Centre (LRC), Human Rights Lawyers; Casual Workers Advice Office; and the Socio-Economic Rights Institute (SERI).

These interventions and services rely heavily on technology and social media platforms such as WhatsApp and Facebook to communicate. Migrant domestic workers, like all migrant workers, see possession of a smart phone as essential in order to communicate with family back home and elsewhere and they will make whatever sacrifice is necessary to get one. However, in

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[37] This is a collective of civil society organisations (CSOs) that was established in response to the pandemic and brings together organisations that provide diverse services from humanitarian, psycho-social to legal support.

some cases they just cannot get the money to get a phone, in others they have a phone but do not have access to data. This means that they cannot participate in, or even access, these social media platforms. MROs were pro-active in addressing this situation during lockdown, providing whatever technical assistance necessary to ensure that all migrant domestic workers could engage. With this engagement, and working through the social media platforms, interventions were co-ordinated and communicated which triggered migrant domestic workers own agency. They came together to seek, and put in place, systems that would provide economic support in the case of future catastrophes. Alongside, this empowerment, the social media platforms also create space for sharing and exchanging information among domestic workers, who would previously have been quite isolated due to the nature of their place of employment.

A significant initiative of these newly empowered workers is the establishment of informal social security neighbourhood networks, popularly known as 'stokvels'. A migrant-rights organisation, Zimbabwe Isolated Women in South Africa (ZIWISA) has been coordinating this process with the support of an NGO, Outreach Foundation.

Informal social security arrangements

Informal social security arrangements fall into two categories; traditional support systems (based on kinship, solidarity and reprocity) and self-organised mutual support systems (based on community or neighbourhood). Dekker (2001) cited in Mosito (2014) defines 'informal social security' as social security provisions for those who work informally, based on the principle of social solidarity. They include all forms of social security outside the formal governmental social security framework. and are self-organised informal safety nets which are based on membership of a particular social group or community including, but not limited to, family, kinship, age group, neighbourhood, profession, nationality, ethnic group (Olivier, and Dekker, 2003). Members are entitled to benefits as stipulated by the primary goal of the network.

The ZIWISA/Outreach Foundation initiative is one of informal 'neighbourhood' social networks. Its aim is to promote solidarity and to support members financially through monthly contributions from income generated through the entrepreneurial support and economic empowerment projects offered by the Outreach Foundation. With the support of Mukuru.Com, an Africa focused, worldwide money transfer platform, the Outreach Foundation provides capacity-building and skills training workshops and start-up capital injections[38]. Domestic workers are encouraged to form co-operatives and gain leverage through 'group bargaining and buying power'. This allows them to purchase groceries in bulk at bargain prices and also to engage in group banking of savings. The co-operatives are comprised of seven members, at most, all of whom are involved in a common entrepreneurial projectt. Lessons have been drawn from Basotho (from Lesotho) domestic workers in South Africa who, for many years, have been involved in this practice. During the national lockdown, Basotho co-operatives were able to access savings to purchase groceries for their members. Thus, even when members were denied UIF, they did not go hungry.

The enigma of the under-represented care and social policy deficits among domestic workers

Despite their fundamental role and location within the global care economy, the labour of domestic workers is under-valued and under-represented. However, according to Mullagee (2011), domestic workers have a long historical trajectory of organising 'despite [their] inherent vulnerability and obstacles to organising, [and attempt] to use the traditional trade union model of organising' (2011: 15). Despite the large membership at the launch of the domestic workers' union, UDWOSA, membership has plummeted over the years as the sector becomes more precarious overall. The increase in the number of migrant workers in domestic service has an impact here, as they tend to view unions

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[38] Interview with Ethel Musonza, the Chairperson of ZIWISA. 02.06.21. Johannesburg

as part of the Home Affairs department and are therefore wary of them. In an interview, the President of UDWOSA lamented the structural impediments put in the way of it registering legally as a union. Paradoxically, the demand for domestic work services has increased while employers devise strategies to circumvent regulatory frameworks in place.

Meanwhile, the domestic workers unions are also poorly supported by mainstream unions. For many years, SADSAWU fought for, not only formal registration with the Department of Employment and Labour, but also for recognition and affiliation to the national federations. The union was deregistered in 2011 (see Mullagee, 2011) and thus, not legally recognised to be included in the tripartite social dialogue. The social dialogue arrangements in the country are a key site of struggles for inclusion and exclusion in social protection policies for domestic workers. It is within this forum that negotiations for the registration of domestic workers for social security ought to take place. The under-representation at the collective bargaining table means that the voice of over one million poor workers are muted. This translates to social protection deficits in normal times and in times of crisis, such as the COVID–19 one.

South Africa is a constitutional democracy with well established institutional workers' rights, despite a weak labour inspectorate and enforcement mechanisms. Another challenge relates to subtle legal impediments centred on thresholds and workplace recognition in a sector where workers operate in isolation within private homes. As this chapter shows, it is clearly time to rethink the concepts of 'workplace' and 'social dialogue' if the constitutional right to social protection for all workers is to be realised. Moreover, considering the agency elicited by migrants and MROs to unlock social protection in the wake of COVID–19, it is important to reconfigure social dialogue provisions. This would involve recognising other forms of worker representation in addition to the traditional trade union model, to ensure social security interventions for all workers including migrants.

Conclusion

Covid 19 has presented many challenges for workers but has also created an opportunity to revisit some long-standing issues. In particular, it laid bare socio-economic inequalities and social policy gaps that privilege workers in standard formal employment thus, neglecting informal workers and migrants. It has also highlighted the issue of exclusion from, or non-compliance with social security legislative and policy frameworks and calls for stricter enforcement mechanisms and labour inspection in the post-Covid19 economy. In this chapter we have noted how restrictive immigration laws and policies make it difficult for migrant domestic workers to acquire the requisite documents to live and work in the country and consequently limit access to social grants. There is need for more regularisation processes such as the Zimbabwean Exemption Permit (ZEP) and the Lesotho Exemption Permit (LEP) to address statistical data deficits and ensure smooth planning and integration of migrants into existing social protection policies. While acknowledging the current socio-economic challenges, it is the responsibility of policymakers to address the Constitutional deficits, guided by the outcomes of court rulings, including from the COIDA constitutional contest against the exclusion of domestic workers from compensation for occupational injuries and diseases. Moreover, synergies ought to be created between migration and social policies if this constitutional lacuna is to be seriously addressed.

In the area of labour relations, there is need to rethink the idea of tripartite social dialogue to include other forms of worker representation, for example, migrant rights organisations and worker advice offices. The addition of such bodies at the collective bargaining table would help to advance informal worker, including migrant-specific demands, related to social protection. It is important also to revisit the concept of social dialogue to include institutional reforms of restrictive immigration laws that exclude migrants from enjoying labour rights and benefits. As this chapter shows, the Covid 19 health crisis led to the revival of some long-standing social struggles beyond the workplace and also triggered migrants' agency and

organising strategies for survival in a foreign land. The crisis of care in times of the health pandemic is a global challenge, that requires the sharing of knowledge on how to integrate informal workers, migrants and asylum seekers into existing social protection policies and welfare systems.

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9. FORCED DISPLACEMENT AND INTERNALLY DISPLACED PERSONS: ANALYSING THE IDP SITUATION IN MOZAMBIQUE.

Lelis M. Quintanilla Noriega

In this chapter, we take a close look at what forced displacement means for the people who flee. What are the main causes behind it and what situations do they experience in their travel from home to their 'new home', their fears, vulnerabilities, new realities, etc? We will analyse the different types of forced displacement, the main drivers, their meaning, and context. Focusing on Internally Displaced Persons (IDPs), we will analyse the impact on the economy, climate change, development, physical and mental health, and social networks, and urban versus rural displacement. Additionally, we will review the importance of community-based solutions, as in the host community's involvement with IDPs and their participation and consultation in the planning and implementation of projects. We will examine the IDPs' situation in Mozambique, to understand what forced them to leave behind everything they owned, everything they knew; risking their lives and those of their children in the search of safety, and what this new reality brings: opportunities, vulnerabilities, risks, threats, and dreams.

Introduction
The Global Program on Forced Displacement (GPFD 2015) defines forced displacement as 'the situation of persons who are forced to leave or flee their homes due to conflict, violence and human rights violations'. Forced displacement can be driven by a) armed conflict, violence, or persecution due to political opinion, social group, race, religion, or nationality, and where the state is unwilling, or unable, to protect them; b) natural disasters, climate change, or human-made disasters; c) development (Forced Migration Online 2012); or d) complex emergencies, which are a result of a combination of two or more of the aforementioned factors (FAO 2016).

People who have been forced to flee can be categorized as refugees, asylum seekers, or internally displaced persons.

According to the 1951 Refugee Convention, a **refugee** is someone who 'owing to a well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion, is outside the country of his or her nationality, and is unable to, or owing to such fear, is unwilling to avail him or herself of the protection of that country' (1951 Refugee Convention, UN General Assembly, Article I, page 152).

The United Nations High Commission for Refugees (UNHCR) defines **Asylum seeker** as 'an individual seeking international protection but whose claim to refugee status has not been definitively evaluated yet. While not every asylum seeker will be recognised as a refugee, every refugee was initially an asylum seeker' (UNHCR 2006).

In a 1992 report, the Secretary-General of the United Nations identifies **internally displaced persons** (IDPs) as 'persons or groups of persons who have been forced or obliged to flee or to leave their homes or places of habitual residence, in particular as a result of, or to avoid the effects of, armed conflict, situations of generalized violence, violations of human rights or natural or human-made disasters, and who have not crossed an internationally recognized state border' (UN 1999, document A/54/409).

One of the main differences between refugees and IDPs is that IDPs are still living within their own country, which means that the responsibilities for protection and assistance fall upon the government, even if this government is the primary cause of the displacement, or if it cannot protect and assist its citizens. (UNHCR The State of the World's Refugees: In Search of Solidarity, 2012). As the Internal Displacement Monitoring Centre (IDMC) puts it:

Escalating violence and the expansion of extremist groups in Ethiopia, Mozambique and Burkina Faso fuelled some of the world's fastest-growing displacement crises, according to the IDMC annual global report. Long-running conflicts, such as those in the Democratic Republic of the Congo, Syria, and

Afghanistan, also continued to force large numbers of people to flee (IDMC, 2021).

Forced displacement has doubled since 2010, when there were 41 million displaced persons. At the end of 2020, the UNHCR estimated that 82.4 million people were forcibly displaced worldwide because of persecution, conflict, violence, human rights violations, or events seriously disturbing public order. There were 55 million internally displaced persons, 48 million of those associated with conflict in 59 countries and territories, and 7 million associated with disasters across 103 countries and territories. Global social and economic trends indicate that displacement will continue to grow in the next decade, exacerbated by population growth, urbanization, natural disasters, climate change, rising food prices and conflict over scarce resources (UNHCR 2012).

As we can see most of the people who have been forcibly displaced are IDPs, which means they have left their homes, villages. towns, but not their country. This may sound like a simple task, just changing your zip code, but in most cases, it is much more disruptive and traumatic than that. Let us look at three scenarios:

1. A family of four has received serious death threats and has witnessed other families suffering violence, including killings. They are very afraid of what might happen if they stay in their town, the place where they have grown up, gotten married, studied, where their family, friends and jobs are. After some hours of considering and analysing their options, they decide they will have better chances if they move to another town where they can settle. Hopefully, one of the parents will find a job at the local market and the kids could go to school and soon they could forget about the threats. But they will not have enough time to sell their house, nor will they be able to sell or take all their belongings, just a couple of bags and their documents. Once they arrive at their new place they will have to stay at a

relative's house until they get a job and have enough money to rent a place. The kids will lose the semester as the school has already started and will help with the house chores during these months. Will they be able to find a job soon? Will they make enough money to rent a place for their family and buy food and send their kids to school? Will they be safe?

2. A family of six, two parents and four kids, is living in a town, barely making ends meet, and war suddenly breaks out. They are being attacked, they see family members and friends being killed and they have no other option but to run away NOW; they do not have time to go back to their house to get their documents, clothes, anything. The family is not even together, some were at work, the children were at school, they all hope they will be able to reunite outside town later, but for now, they must manage to stay alive, hiding, running, without water, food, or a plan. Where to go? What to do? How to find the missing family members? How to survive? Without documents, will they be able to get a job, access health services, financial services, anything?

3. A family of five is living in an earthquake-prone area and a 7.5 earthquake (Richter scale) suddenly hits their town, reducing their house and most of the town's houses to rubble. They are forced to flee due to fear of aftershocks, but where can they go? Where can they sleep? When will they be able to return home? Will they be able to recover any valuables from their house? They receive information that the government and NGOs are offering temporary shelter and food to people who have lost their homes in a school in the nearest town, which is 30 mins away, so they decide to go there. Once they arrive, they receive food and a place to sleep within the school. But they are not certain how long this support will last. After a couple of days, the father decides to go back to their town to assess the situation and determine if they can return. Although there is no certainty that aftershocks have finished, the main threat seems to have passed, but

everything is destroyed. There is nothing left but bricks and dust where their house once stood and most of the town seems to be in the same condition. Where to begin? Is it safe to come back or would it be wiser to try and settle in the other town? How can they get money to build a new house?

So, we can see from the above that a variety of situations can drive forced displacement and determine whether that displacement will be temporary or permanent. They also give a clue into the possible conditions of the displaced. In most cases, the original situation is not ideal to begin with, and people do not have a safety net. So, when forced to flee, their situation deteriorates quite rapidly, thus aggravating food insecurity, debts, unhealthy habits which can drive them to rely on negative coping mechanisms such as drugs, sex trade, violence, etc.

The Overall Impact of IDPs

The movement of people from one area to another has an impact, that can either be positive or negative, on both the place of origin and the new place of residence, on the IDPs and on the host community. It has an impact on the health, education, economic, cultural, legal, and industrial domains. We will now review some of the possible impacts of these movements. In doing this, we recall, as stated in the UNHCR Global Trends Report for 2020, the dynamics of poverty, food insecurity, climate change, conflict and displacement are increasingly interconnected and mutually reinforcing, driving more and more people to search for safety and security elsewhere.

IMPACT ON ECONOMY

When IDPs leave their hometown, they do not just leave their house, they stop producing, buying, spending, etc. in that area. With each family fleeing, the economic situation of the town or city changes, but what happens to a city or town when not one family, but 20-30 percent or more of the resident families are forced to flee? How is the economy impacted, how are the demand and offer of the local market affected? Can it recover?

And how does the arrival of IDPs to a new place affect its economy and how does it impact the host community? As IDPs start to move through the country and settle in camps or cities, they need to buy food, use transport, access local services. Most likely, they also add to unemployment levels, with a possible knock-on effect on local wages and taxes. When IDPs move to cities they often lack the necessary skills required to gain formal employment and therefore depend on the informal economy to make ends meet. Inevitably, these jobs are low paid and, in some cases, may even require a little start-up capital. The ILO estimates that the pandemic saw a decline in earnings for informal workers of up to 82 percent in low and lower-middle-income countries, where most IDP and refugee populations are located.

IMPACT ON CLIMATE CHANGE

The UNCHR, in its Global 2020 report, mentions that climate change increases the risk of displacement, makes it harder for displaced people to return home and poses a multitude of risks and protection concerns during displacement. Approximately 20 percent of the world's population lives in a highly climate-vulnerable country, with those who later become refugees and IDPs being particularly at risk. Nearly 90 percent of refugees under UNHCR's mandate come from a highly vulnerable country. These same countries host over 40 percent of refugees, and nearly 70 percent of IDPs, displaced by conflict. Over the last decade, weather-related events are estimated to have caused more displacements than conflict at a worldwide level.

Research demonstrates a complex relationship between climate change and conflict. IN 2020, 95 percent of all conflict displacements occurred in countries vulnerable or highly vulnerable to climate change. Disasters, due to both sudden and slow onset hazards, routinely hit populations already uprooted by conflict, forcing them to flee multiple times. This is the case with IDPs in Yemen, Syria and Somalia and refugees in South Sudan and Bangladesh (IDMC, 2021). When people are displaced, they leave their familiar ecosystem and natural resources behind and are forced to adapt to a new ecosystem. Also, it is almost

inevitable that displacement will increase pollution and resource depletion in host communities.

IMPACT ON DEVELOPMENT AND EDUCATION

As mentioned above, most IDPs are living in low and lower-middle-income countries that have huge development challenges. The movement of IDPs heightens those challenges as the need for infrastructure, health, services, schools, etc. increases, putting more pressure on the government, private sector, and civil society. In the 2021 Global Report on Internal Displacement (GRID) report, the IDMC estimates that by the end of 2020, more than 23 million people under the age of 18 were internally displaced worldwide (IDMC GRID report, 2021), posing significant impacts on their education and future development.

In general, forcibly displaced persons are less likely to access education than their non-migrant peers. However, forced displacement does not universally lead to a reduction in access to education. Where families are forced to flee from areas with very few schools to urban areas or organised camps with more schools, displacement can increase access to education (Bengtsson and Naylor, 2016).

Some of the barriers IDPs face in accessing education relate to lack of documentation, school fees, transport and, in some cases, language. There are particular challenges for girls as they are sometimes required to stay at home to help with house chores or forced into child marriages or teenage pregnancy.

IMPACT ON PHYSICAL AND MENTAL HEALTH

During the 2020 Nobel Peace Award Ceremony where the World Food Program received the prize, the Norwegian Nobel Committee described the link between hunger and armed conflict as a vicious circle in which 'war and conflict can cause food insecurity and hunger, just as hunger and food insecurity can cause latent conflicts to flare up and trigger the use of violence'.

It is very often the case that displaced persons, who move to cities, can only find accommodation in areas that are not safe. Frequently, they also lack access to water and sanitation, and even

humanitarian aid as they are spread out across the city and difficult for aid agencies to reach.

The same goes for the treatment of general and chronic health issues as most IDPs do not have easy access to health services. Lack of documentation and lack of money are the main reasons for this. Without access to basic health care, non-communicable diseases may go undiagnosed, making otherwise treatable conditions potentially life-threatening. Under conditions of conflict, entire food systems are often severely disrupted, challenging people's access to nutritious foods and damaging their health, and in the case of children their development (WFP, 2021). Early-life under-nutrition is a major risk factor for many non-communicable diseases. (Branca, 2019).

Many IDPs suffer from post-traumatic stress disorder and, again, have very little access to mental health services or psychological support. Exposure to violence, food insecurity, health-related issues, economic stress, living in unsafe conditions are all factor that will most likely negatively impact mental health (Suprenant et. al., 2020). IDPs with disabilities can face additional physical, financial, and informational barriers in terms of safety and support. They also struggle to access enough food to eat and to participate in community life. (Yasukawa, 2021).

IMPACT ON SOCIAL NETWORKS

When conflict or violence strikes and members of a community begin to move away, other members might, in turn, be motivated to leave as community structures break down. Conversely, when reaching a new settlement, be it either a camp or city, social networks become critical on the path to becoming self-reliant. They provide support in the early days of displacement in areas where formal networks might not be available A sense of belonging to a community or group helps provide a certain level of safety. As IDPs integrate more into the host community they form additional social networks which help them cope and contributes to them regaining dignity and self-reliance.

There were twice as many internally displaced people in urban areas than there were in non-urban areas at the end of 2020 (UNHCR, 2021). This means that urban locations are the main destination of forcibly displaced populations (Fiddian-Qasmiyeh, et. al 2012). As the IMDC puts it:

> The rapid and unplanned nature of this urbanisation has the potential to aggravate existing challenges and create new ones. Many of the region's urban dwellers have little or no access to water and sanitation. Millions of people live in inadequate housing, in overcrowded, underserved, and marginalised neighbourhoods, in conditions of high exposure and vulnerability to hazards and displacement risk. Some cities are also trying to cope with significant influxes of IDPs from rural areas. Urban floods are a major challenge where thousands of people tend to be displaced during the rainy season. When crises hit, local authorities often struggle to respond to the needs of those affected, including IDPs. They tend to be understaffed and underfunded and rely on resources provided by national authorities and, in some cases, the international humanitarian community. Response capacity also varies between smaller and larger cities, an issue that needs to be considered in future interventions and investments that aim to tackle the challenges associated with urban displacement (IMDC GRID, 2019, p.22)

Importance of Community-based Solutions

Prior to being displaced, IDPs had their traditions, lifestyle, activities, and religious practices in the areas where they lived. When IDPs arrive at a new location they have to interact with the host community, which most probably will have different traditions, ways of living, and practices. A community-based approach to dealing with this dilemma and minimisng friction, involves the active participation of both the IDP and the host community, which helps empower communities and contributes to their rebuilding and restoration of livelihoods.

Mozambique is one of those countries that has been severely impacted by both natural disasters and by conflict, generating ever increasing numbers of IDPs. In this section, we will analyse the situation of IDPs in the country, what they have faced to date and their current situation.

FORCED DISPLACEMENT IN MOZAMBIQUE

Mozambique is ranked 181 of 189 countries on the Human Development Index (HDI) and is categorised as a low human development country (UNDP, 2020). Almost half of the population (48.4 percent), mainly in rural areas, live below the poverty line which is set at 1.9 USD (adjusted for purchasing power parity) per day (World Bank, 2018).

> While progress has been made in terms of poverty reduction in recent years[39], due to growth in emerging sectors of the economy (like the service and extractive sectors), evidence shows that the distribution of income is not equal, undermining the overall poverty reduction potential of the economic growth experienced" (WFP, 2021).

Since 2017, the Cabo Delgado province in Mozambique has been the scene of an increasingly violent and brutal conflict. Islamic insurgents have launched attacks in the north of the province. Government forces, backed by US and South African mercenaries, have launched counterattacks, and have also caused extensive loss of life amongst the civilian population. Since March 2020, the violence has increased in intensity and brutality. Entire villages have been burned to the ground. Schools, health facilities, churches and missions have also been destroyed. There have been numerous reports of mass beheadings and disembowelments.

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[39] Reduction in poverty rate between 2008/9 and 2014/15 period of more than 10 percent, from 58.7 percent to 48.4, respectively.

More than 4,633[40] have been killed, and more than 732,000 (OCHA MOZAMBIQUE, 2021) have fled, with children accounting for an estimated 54 percent of people displaced, making this one of the largest forced displacements and worst humanitarian disasters on the African continent.

Many IDPs have fled to the south of Cabo Delgado province, around the city of Pemba where they live in absolute destitution. UNHCR recently announced that it provides aid to no more than 9 percent of IDPs and does not have the funding to continue. This is already resulting in widespread malnutrition, cholera, malaria, and death from starvation.

March 2021 was marked by a large-scale attack by in the Palma district in the north of Cabo Delgado province. This led to a displacement of over 17,000 people, of whom 43 percent were children. According to the last UN update, an estimated total of 118,534 people have been displaced from Palma alone, with some of them moving two or three times, as attacks take place in different towns across Cabo Delgado.

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[40]https://www.caboligado.com/reports/cabo-ligado-weekly-19-25-july-2021

Caroline Gaudron, MSF Strategic Support in Mozambique, described in an interview part of the ordeal people went through when fleeing from the Northern towns of Cabo Delgado:

> Many of them walk for over 200 kilometres, their belongings on their heads, a baby hanging on their back, a little one holding their hand. They spend the nights outside. They are in hiding, fearful of being seen by a group of insurgents or of running into soldiers who may suspect them of being insurgents themselves. Both groups wear the same uniform and are nearly impossible to distinguish between. When possible, people prefer to make the journey in a chapa, or truck, crammed with others who share the same destiny, alongside packages and animals. Others choose to embark on a fishing boat that threatens to sink under the weight of its many passengers at any moment, and which does not protect them from an attack since the insurgents also move by sea, travelling from island to island.

Each family has its own story of fear and terror to overcome, but the thing that terrifies them the most is the uncertainty about their future: when if ever, will they be able to return home? Will they lose their lands? How will they become self-sufficient again here or there? Will their children be safe? Will they receive an education? Will they recover from the trauma they have experienced?

People were forced to flee and leave everything they had and knew behind to save their lives, hiding in the bushes, walking, running, thirsty, hungry, and scared. Some of them reached Pemba and were allocated to one of the temporary settlements, with the promise of relocation to a permanent settlement in the months to come, but there have been so many people coming in, that the capacity of the settlements has been surpassed. Families live in temporary tents, one next to the other, and survive through food supplies and non-food items (NFIs) provided by the UN agencies and NGOs. In the permanent settlements, they live in shelters with more structure and more space, they have some land

to farm and are provided with NFIs and agricultural tools and with food aid for the first few months. In some of the settlements, schools have opened, and children are beginning to attend, although most lack the necessary school supplies. There are very many needs, and these vary from settlement to settlement but the most prevailing include: hygiene and health (with many cases of Cholera, Malaria, Diarrhoea, Malnutrition, and risk of COVID-19), education for children and youth, safety for children and youth as there is a high risk of sexual abuse and exploitation, protection for the elderly and the disabled. According to the IOM:

> In 82 percent of settlements, the majority of IDPs would like to return to their place of origin in the future. In 79 percent of settlements IDPs intend to remain on the sites for longer than 3 months, with most indicating that they will stay on the sites until the conflict ends (IOM – MSLA R3, June 2021)

The south of Cabo Delgado is so overcrowded it cannot absorb more IDPs. In addition to that, they suffer extreme hardship there and fear that the insurgents will attack the city of Pemba itself. For these reasons, some IDPs keep on walking and move further South to Nampula, Mozambique's third-largest city. They arrive there, having travelled 300 km on foot, severely dehydrated, malnourished and in poor health, with outbreaks of cholera and malaria on the rise. Nampula has a population of 800,000 which now has more than 65,000 IDPs registered there, 35,000 of whom are children. The vast majority, 90 percent are living with relatives and family members who, in most cases, were already living in dire situations. Others, approximately 4,000, live in the Corrane Reception Center, run by local government authorities.

In early March 2021, I interviewed some IDPs who are now living on the outskirts of Nampula city. They shared stories of their harrowing experiences and their journey to Nampula:[41]

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[41] The interviewees asked that their names be withheld for security reasons.

We were forced to flee our lands and come to Nampula, our houses were burned, we ask the government for its involvement because we want to go back to our land. Some of my family members died in Cabo Delgado, others are here, but here we survive on whatever is provided to us. Back home we worked and produced enough food for us to live and survive (JF).

My house was burned, and my husband killed by insurgents in Cabo Delgado. Living in Nampula is different from what it was in Cabo Delgado. I had to run and hide in the bushes, and it took me more than 3 days to arrive in Nampula (SS).

I am grateful for the help I have received in Nampula. We want the war to stop because we want to go back home. A lot of our friends and loved ones died, a lot are starving, hiding in the bushes. We had to leave with nothing, so we are cold, we sleep on the floor (JP).

Corrane Reception Center and the way forward

The Corrane Reception Center began receiving families in November 2021. To date, they have been housed, received food supplies, NFIs, seeds, and agricultural tools. But support now needs to move beyond emergency relief for these people. Meanwhile, other families, who are in need of help, continue to arrive.

In the Reception Center, the government allocated plots of land for the families, and they were all given a temporary tent. Electricity was installed. The Center has 4 water pumps for the whole community, which means that each water pump covers approximately 1000 people a day, involving very long queueing

times for water. This is not in line with Sphere Standards[42]. Food distribution at the Center takes place monthly, with all families receiving rice, beans, oil, maize, sugar, and salt.

There is a Health Center which consists of 3 to 4 tents with no beds, no medicine storage, no ambulance, nor surgical equipment. in the case of an emergency, an ambulance is despatched from the Community Health Center, which is approximately 15-20 mins away.

The 1,500 children living in the Corrane Reception Center attend the local community school, which previously had 300 children. It now has 1,800 children and only three teachers. This means 600 children per teacher. Coupled with this, the children have no school supplies nor uniforms.

There are now two projects in Corrane to provide more permanent housing to 500 families. The model of the house resembles the type of construction the families had in Cabo Delgado, with each house having two bedrooms and a living room. A focus group was held with some members of the community and beneficiaries of the scheme to gather their feedback about the first houses built. They said they '…feel safe and protected. The house division offers some privacy, and the living room has a proper space.'

The goal is to develop a support model that works towards a cycle of turning emergencies into development projects, to ensure sustainability, self-sufficiency, and well-being. For example, a family that arrives today at the Reception Center will receive Emergency Relief assistance for six months (food, housing, NFIs, etc.). During this time, support will also be provided to help this family move towards self-sufficiency through engagement with sustainable livelihood projects[43], and provision of mental health and psychosocial support (MHPSS). Thus, by the beginning of

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[42] The Sphere standards are the most commonly used and most widely known set of core humanitarian standards.

[43] "Sustainable livelihood refers to people's capacity to generate and maintain their means of living and enhance their own well-being as well as that of future generations." (Livelihoods Center)

month seven, this family will have moved from the Emergency Relief stage to development stage 1. Here they will receive a different type of support to help them move towards stage 2, and so on… The development of this model requires cooperation, coordination, communication, time, and resources from the government, UN agencies, NGOs, International Non-governmental Organisations (INGOs), and Faith-Based Organisations (FBOs).

Conclusion

As natural resources become more scarce and natural disasters more frequent, conflict too will continue to be present. Thus, more people will be forced to leave their homes in search of security, water, food security, jobs, education, and health services and they will generally head towards urban areas. The greatest challenge is to maintain, or develop, livable and stable conditions in rural and urban areas, so people do not need to leave their homes, but can find opportunities to thrive within their own towns or cities. For this to happen, governments, businesses, and civil society need to work together to find sustainable solutions for communities and to make sure everyone within that town, city, or country has equal rights and equal access to the basic needs, services, and opportunities.

In cases where people do end up being forced to flee, governments, host communities, the humanitarian community and the forcibly displaced community need to work together. They first need to provide and fairly distribute emergency aid to ensure survival in the first instance. They then need to develop sustainable inclusive solutions that will foster growth in that community. These solutions need to be developed through a community-based approach, which involves the inputs of all relevant parties during the planning and implementation phases, with monitoring and accountability systems in place to help with learning and adjustment.

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10. UNDERSTANDING IMPERATIVES FOR TOTAL SCHOOL ENROLMENT AND RETENTION AMONG REFUGEES: THE SOMA-SOMA INITIATIVE IN NAKIVAALE REFUGEE CAMP IN SOUTH-WESTERN UGANDA.

Firminus Mugumya, Marion Mugisha Mutabazi, Hilary Asabahebwa, Sylvanus Mushabe, Mukamba January, and Arlene Akimana

Introduction and Background

Refugee children, most especially girls, are more likely to miss school or to fail to invest the required level of concentration to be able to learn (Meyer et al., 2019). The extent to which refugees build the necessary resilience to mitigate their situations, particularly those that affect children's education is important to understand. This chapter examines critical imperatives for initiating, stimulating, and sustaining refugee interest to pursue good education outcomes for their children. It also examines factors that serve to undermine refugee resilience towards education and recommends strategies and alternatives for sustainable access to, and utilization of, basic education services for refugee children. It is informed by a detailed case study of a community-based school readiness program in three communities in Nakivaale Refugee settlement in South-Western Uganda. The case study involved meetings and interviews with refugee parents/ caregivers; leaders of community-based services; community leaders; initiators/promoters of the education initiative; and instructors on the programme,

Globally, over 70.8 million people are forcibly displaced from their countries. Of these, an estimated 28.9 million are refugees and more than half are children (Kiteki, 2021). Due to recurrent civil unrests and emergencies in neighboring South Sudan, the Democratic Republic of Congo (DRC) and Burundi, by July 2021, Uganda had a total refugee and asylum population of just under 1.5 million, making the country host to the third highest number of refugees in the world, and the highest in Africa. Of that estimated 1.5 million, over half (59 percent) were under the age of 18 years (OPM & UNHCR, 2020; UNHCR, 2021). Inevitably, the risk is high for such an influx of young people to fail to attain a

desirable level of education. While refugees have been part of the African landscape for some time, and that of Uganda in particular, they still face marginalization in respect of education. The review of literature indicates that many times, refugee children who are in school, or ready to start school, end-up having their education disrupted because they are faced with the challenge of adapting to a new environment or a new culture, which ultimately affect their schooling and career development (Kiteki, 2021; Thomas, 2016).

In Uganda, efforts to integrate refugee and host communities in the provision of education services, are yet to yield desirable outcomes. Just over half (58.2 percent) of refugees in Uganda are enrolled in primary school, while only 11.3 percent attend secondary school (Schalit, 2018). By 2018, it was estimated that if all refugee children of school going age are to access quality pre-primary education, 5,549 new classrooms would have to be provided, and 4,116 new caregivers would be needed (Ministry of Education and Sports (MOES), 2018). By 2019, the MOES estimated the average number of pupils in refugee-hosting districts to be 601,799, with a teacher-pupil ratio of 1:88 (2019). Classrooms in refugee districts remain worryingly over-crowded and lack essentials such as desks, books, and clean water. By 2020, more than 30 percent of children living in refugee settlements were not attending school (Higuchi, 2020). In Rwamwanja refugee settlement in western Uganda, only 3 percent of young refugees were able to access secondary school in the camp (Sportanddev, 2019).

International and Regional Committments on Refugee Education

Nations have a responsibility to honour international and humanitarian commitments with respect to refugees and forced migration. Yet, the education of refugees in foreign countries is not an indivisible right (Kupfer, 2016). The government of Uganda has ratified several international and regional agreements, most of which have a bearing on the right to education of refugee children. Relevant laws have also been enacted and policies adopted, including those that empower some public institutions to respond to the education needs of

refugee children in Uganda. At the international and regional levels, Uganda ratified the 1989 Convention on the Rights of the Child, and the 1990 African Charter on the Rights and Welfare of the Child. Being a member of the Intergovernmental Authority on Development (IGAD), Uganda is also part of the 2017 IGAD Djibouti Declaration on Refugee Education, where member States committed themselves to establishing regional minimum education standards on access and delivery of quality education for people with special needs to benefit refugees, returnees, and host communities in order to maximise learning outcomes. The countries also committed themselves to use local and international partners to provide increased and sustained support for infrastructure and capacity building for skills development in refugee hosting areas, and to integrate education of refugees and returnees into national education sector plans by 2020 (Ministry of Education and Sports, 2018). It is also worth noting that Uganda is a signatory to the United Nations Convention on the Rights of Persons with Disabilities.

At the national level, the education-related rights and freedoms of refugee children have been enshrined in a number of instruments including: the Children's Act, Cap 59 (as amended); the Refugees Act of 2006; the Education Act of 2008; the Universal Primary Education Policy; the Universal Post Primary Education and Training Policy; Refugee Regulations 2010; the Comprehensive Refugee Response Framework for Uganda (CRRF) (2017); the Education Sector Strategic Plans and the Education Response Plan for Refugees and Host Communities. For example, Section 4(1)(j) of the Children Act, Cap 59 calls for treatment without discrimination of all children in Uganda, regardless of ethnicity or nationality. Sections 32 (1) of Uganda's Refugees Act of 2006, and 4(2) of the Education Act emphasize the right to education of refugee children at primary school level (Government of Uganda, 2006, 2008). Objective one of the Education Sector Strategic Plan (2017-2020) relates to the need to develop and implement response programs for the provision of quality education to refugees and host communities. The aim of the Comprehensive Refugee Response Framework is mainly that of facilitating different actors to agree on policy priorities,

enhance development in the refugee hosting districts, and to enhance integrated service delivery in areas of education and other services for both refugees and host communities (Ministry of Education and Sports, 2018). Also known as Global Goals, the Sustainable Development Goals (SDGs) were adopted in 2015 by the United Nations to serve as a universal call to end poverty, protect the planet, and ensure that, by 2030, all people enjoy peace and prosperity. Limited access to quality education for refugees directly impacts the extent of attainment of the fourth sustainable development goal (SDG), i.e., 'ensuring inclusive and equitable quality education and promote lifelong learning opportunities for all.'

What is undermining Refugee enrolment and Retention in Schools?

Educational challenges among refugees in Uganda occur at multiple levels, starting with individual learners, their households/families, then community and policy level. Limited financial ability to adequately invest in education both at family and school level, unsupportive social cultural values that often undermine girl child education by promoting early marriage remain key obstacles (Schalit, 2018).

ACCESS AND AFFORDABILITY

Inadequate school infrastructure, both in quality and quantity, to facilitate learning remains a problem in nearly all refugee settlements and host community settings in Uganda. Some primary schools have only one classroom for over 715 students and without textbooks (Higuchi, 2020). In addition to inadequate classrooms, the limited number of schools in the camps mean that children have to walk long distances to school and back home, and some, especially girl children, face risks of abuses or assault as they commute.

At the individual level of refugee learners in Uganda, feelings of discrimination among some have been recently reported (Ministry of Education and Sports, 2018). Discrimination not only affects their participation in class but can also lead to low self-worth and withdrawal from school (Stark et al., 2015). At a family

level, factors like gender, age, family structure and poverty impact on the education of refugee learners. Gender and disability seem to be critical inclusion issues (MOES, 2018). Refugee learners in orphan and child-headed households face greater challenges of poverty, often having to choose between work and school, and paying school fees for younger siblings on order thay they get education (Schalit, 2018). By 2018, there were no known statistics of refugee learners with disabilities in refugee settlements of Uganda (Ministry of Education and Sports, 2018). However, this certainly did not mean they don't exist. What is clear is that refugee learners with disabilities have huge problems in accessing education at a very basic level due to issues such as overcrowding in classrooms, lack of specialized teaching staff, lack of appropriate learning materials and long distances to travel.

Access to secondary education among refugee populations in some district hosting communities is as low as 11 percent, with only one third of that being girls (Schalit, 2018). In the first instance they can find it difficult to gain admission because of lack of documentation to prove completion of primary education in their home countries. Then there are a myriad of issues that make access extremely difficult, issues such as poor school facilities; lack of teachers; inadequate space, hygiene, study materials, food; distance between school and home, corporal punishments; bullying, language barriers, lack of laboratories, and lack of internet services (Kupfer, 2016; UNHCR, 2018).

For girls the situation is even more difficult. Alongside the issues already listed and societal and familial barriers, they also have to contend with lack of menstrual hygiene facilities in schools; inappropriate curricula, distance to travel (and the risks this entails); lack of protective environments; and lack of well-trained teachers to handle diversity in teaching (Ministry of Education and Sports, 2018; Schalit, 2018). The likelihood that the girls remain home to attend to household chores while the boys go to school is known to be high (Kupfer, 2016).

The dominance of a humanitarian and relief paradigm in response to refugee needs, often based on short-term thinking, is a challenge to the education of refugee children. It means that

most interventions and responses tend to be skewed towards relief support rather than towards investment in long-term infrastructure in support of long-term service delivery. Short-term interventions, without long-term education planning, often results in literacy-based education, that only focuses on teaching the children and young people how to read and write. This is at the expense of enrollment and retention at other levels. As a result of this thinking, educational opportunities available to refugee families are very limited. Yet, it is the case that some refugees live in settlements for a time long enough for their children to study and complete education in that area. It is necessary to provide integrated services that target both refugees and host communities, but it is also crucial to ensure that any infrastructure set up is not underutilized, should the refugees eventually return home to their countries.

Many agencies are supporting refugee and host communities in Uganda in basic service delivery, including that of education.[44] In Nakivaale Refugee settlement, as in many other settlements in Uganda, Windle International Uganda (WIU)[45] is deeply involved in providing quality education for refugees and host communities. The agency provides infrastructure, such as classroom blocks, latrine stances for girls and boys, and housing for teachers among others. In Nakivaale, WIU has established schools that are considerably cheaper than Government aided schools. Despite such interventions, many children in both refugee and host communities remain out of School, with Congolese children having particularly low numbers of attendance. The average distance of 1-2 kilometres to a primary school is not a serious constraint to enrolment and retention in

[44] On behalf of Government, the Office of the Prime Minister (OPM) together with the UNHCR oversee whatever these agencies do in the settlements.

[45] Windle International Uganda is part of Windle International, an INGO made up of independent charitable organisations based across East Africa and the UK.

schools. However, access to secondary schools is much more problematic, as due to distances, it generally involves boarding, the cost of which is generally beyond the reach of most families. Nakivaale refugee settlement covers three sub-counties, but had no single secondary school until 2013, when WIU constructed and equipped Nakivaale secondary school. Despite the current government policy of ensuring that every sub-county has a fully-fledged secondary school, only a three-classroom secondary school was constructed at Rubondo in 2019. Both Nakivaale and Rubondo secondary schools are community managed, and, under normal circumstances, considerably affordable at about 290,000 Uganda Shillings ($82) per term per child for boarding, and much cheaper at about 190,000 UGX ($50) for those who commute.

LIMITED INVOLVEMENT BY REFUGEE PARENTS IN THEIR CHILDREN'S EDUCATION

Communities and parents play a crucial role in ensuring school going-age children go to school. But this is obviously more challenging for refugees than for their host communities. However, the literature shows that refugee communities in Africa are starting initiatives to get their children to school, despite the huge challenges of displacement. In Kenya, the south Sudanese refugee community started a school in their community which increased school enrollment of refugee children. The school provided a welcoming and secure environment for children's learning, facilitated by an effective collaboration between various actors in the education sector to improve refugee learners' learning conditions (Karanja, 2010). This chapter attempts to draw lessons from an initiative that has brought refugee parents together to address the education needs of their children in Nakivaale Refugee settlement. The very first step to move forward with such initiatives is to stimulate initial dialogues with refugee communities. This requires a catalyst, either from within or outside the refugee settings. Bellino and Dryden-Peterson (2019) argue that while global policy can foster structures for physical integration, social integration within refugee camps depends on local strategies and practices, encompassing formal decisions and beliefs about the purposes of educating refugees

and their long-term inclusion in host societies. Being a refugee child, and being branded by members of the host community as a special category of child or learner, merely on grounds of being a refugee, has been said to have an impact on the schooling of refugee children and their development in the academic field. The absence of parental support makes this situation worse, in terms of developing children's resilience. According to Shuab and Crul (2020), the structural formation of refugee children as a vulnerable special category greatly affects their schooling, and in some countries, this has led to segregation of refugee children through being allocated particular sessions. Language is always a crucial inclusion/exclusion factor for refugee children in the schools of their host countries/settings. For example, the ease of understanding english language was found very critical in the inclusion of Syrian refugee children in the United Kingdom (Madziva and Thondhlana, 2017). Similarly, language inhibited refugee parents from involving themselves in the schooling of their children (Rah, Choi and Nguyen, 2009). In Uganda, refugee children from Burundi, Congo DRC, South Sudan and Somalia have to study in the English language if all, or part, of their education is to be attained in Uganda. Inevitably, their parents' involvement in the school system is affected by this. It is also affected by the pressures of their socio-economic status, and by attitudes towards school authorities in the host community setting. The need to create a parent liaison position for refugees in host community schools, tapping into existing community service organisations and promoting parent education programmes, has been recommended as an important strategy for enhancing refugee parents' participation in education (Rah, Choi and Nguyen, 2009).

THE SCHOOL ENVIRONMENT

Schools play a pivotal role in maximizing the learning potential of refugee children and in helping them find a sense of safety (Thomas, 2016), and are one of the immediate most influential systems for young refugees (Kia-Keating and Ellis, 2007). A good learning environment in schools attended by refuge children largely depends on the cultural responsiveness of

teachers/instructors. Given the limited material resources at their disposal, uncertain local connections, and little, or no, knowledge of the language in host community settings, refugee families and their children take a long time to adjust (Stark *et al.*, 2015). These circumstances are exacerbated by limited availability of holistic education services.

Research evidence emphasises the need to put in place an education system with tools that enable teachers to adequately respond and adapt to the cultural needs of refugee children (Soylu, Kaysılı and Sever, 2020; Chwastek *et al.*, 2021; Kia-Keating and Ellis, 2007). A music therapy program for newly arrived refugee students in Australia showed a significant decrease in externalising behaviours, with particular reference to hyperactivity and aggression, although no significant differences were found in other behaviours (Baker and Jones, 2006). A study on the educational needs of, and barriers faced by Syrian refugee students in Turkey noted that while public schools were providing many Syrian refugees access to education and secure learning environments, these schools had poor school conditions, limited capacity of teachers, shortage of sufficiently trained teachers to instruct refugees, inadequate resources and inappropriate curriculum planning, all of which impeded the provision of high-quality education (Aydin and Kaya, 2017).

LANGUAGE AND AMBITION AS A BARRIER TO ENROLMENT AND RETENTION OF CONGOLESE REFUGEES

The way refugees perceive education may vary depending on their social-cultural backgrounds. Our interviews with the leaders and service providers (current and past) in Nakivaale, indicate that Congolese refugees who constitute the majority[46] tend to be a lot less likely to seek quality education services than their Sudanese, Burundian and Rwandese counterparts. Two major reasons stand out: the first is that being of a Francophone

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[46] According to the updated February 2020 statistics, Congolese in Nakivaale Refugee settlement constituted 50%, followed by Burundians at 30%, and Somalians (10%) Rwandese (9%), and Eritreans (1%)

background, Congolese Refugees often find it hard to integrate into Uganda's predominantly Anglophone education systems. Congolese children who already have attained some education have to be introduced to learning in English and in many cases are demoted to a level of learning in Uganda, usually significantly lower than the level they are actually at. A refugee who went through the experience of having to be demoted to lower classes due to his inability to communicate well in English shared a personal experience as follows:

> For me personally I came when I was in senior two in DRC but when I went to consult on how to continue my education here, I was told that I cannot even go to senior one; that I did not know English; I was then advised to join in Primary 6, resulting into a loss of four years of schooling… On hearing that I was earlier in senor two and had to start again from six, some of the colleagues I was with chose to 'sit' home.

Unsurprisingly, language as a barrier to normal progression in schooling among Congolese refugee children was said to affect girls more severely than boys. Girls are perceived and/or perceive themselves as 'too big' to join lower classes, and hence, receive comparably limited support from their parents to go to school. As a result, the girls stay home to 'assist' their mothers in domestic chores, with the next step frequently being persuasion, or coercion, into early marriage.

The second major reason for the Congolese lack of engagement is that Congolese Nationals tend to prefer, and in fact struggle, to move and seek asylum in western countries in Europe or America. Once they leave their country (sometimes under quite minimal threat), they have already decided that the best destination is not another African Country, but a destination in Europe or America. This 'plan' begins to take shape from the time when they succeed in registering as Refugees in Uganda: 'they are here on transit so you cannot tell them to start to invest in educating from here when they know that they are on their way out. Education needs patience and many of them know that they

are just going to be here for six months, so education is not their priority. They know they are here but, after some time they will go' remarked a Congolese Refugee.

Confronting the Hitch? The Soma-Soma Initiative

Soma-Soma is a community-based school readiness programme, which started as a pilot in 2019. It targets refugee children in Nakivaale between the ages of six and twelve with the goal of enrolling them in mainstream primary education within three to four months. The pilot program began in September 2019 with 150 children who, at that time, were not enrolled in any school. Working with local instructors, parents, and community leaders in three communities of *Isanja*, *Kabazana*, and *Kalintima*, the children participated in school-readiness activities such as reading, singing, games and socialization for two to three hours a day, three days in a week. At the end of the non-formal instruction, children are enrolled in primary schools of their choice. The Soma-Soma initiative has been applauded for nurturing refugee children's interest in school. Community leaders, parents and guardians of the children in the Soma-Soma initiative that we talked to were very enthusiastic about the programme. A community member in a meeting with a group of parents and caregivers remarked:

> ...we have been here in this camp for many years but had not thought about such good initiative; I thank Now and Tomorrow for the efforts in organising us to have something for our children. This is something we should not allow to stop. We will do our best in our means to keep it going.

HOW IT ALL STARTED

The Soma-Soma initiative began with persistent expressions of concern by a few members of the refugee community that many children of school going age were out of school, despite existing primary schools offering services at nearly zero cost. Perplexed by this, these community members, led by an activist Social Worker (a co-author of this chapter), set out to engage with the

wider community on how to address this. Initially, the team wanted to understand what the parents and caregivers of these children thought about them being out of school. Later they collected information from three villages where the numbers of children out of school seemed particularly high. They established that in one community, there were 518 children who were not attending school, 112 in another, and 96 in the third. With support from *Now and Tomorrow*, a local community-based organisation (CBO), meetings were held in each community and all parents were invited. The findings were presented, they deliberated on the causal factors, agreed collectively on what needed to be done and thus the Soma-Soma initiative was born.

Initially, the Soma-Soma programme could not afford to enrol all the children that were identified in the three villages through the registration exercise. The champions of the initiative did not have enough resources at their disposal to hire and remunerate instructors, despite the enthusiasm refugee parents had started to demonstrate. The decision to further engage the parents on which categories of children needed to be prioritised to meet the target of 150 across the three villages underpins community participation imperatives for sustainable solutions. In consideration of the differences in vulnerability, it was agreed that, with the limited support available from *Now and Tomorrow*, orphaned children would be given first priority. It was further agreed that, at least one child in a household of three children be considered and that the girl child be prioritised for inclusion. And so, the first cohort of Soma-Soma students consisted of mainly orphaned children. With further resource mobilisation and growth in enthusiasm of the parents, more children were to be targeted in the second phase of the Soma-Soma programme.

The experience from the Soma-Soma pilot initiative indicates that primary schools that take up graduates from the Soma-Soma programme found the children extremely ready for primary school (see photograph 1 below showing the head-teacher of *Juru, a* government aided primary school receiving graduates of the Soma-Soma initiative, and others enrolling at *Kabazana* government-aided primary school in photograph 2)

Photograph 1 Soma-Soma Children enrolling at Kabazana Primary School

Photograph 2 heat-teacher receiving Soma-Soma graduates at Juru Primary School

The Soma-Soma programme achieved very high levels of enrolment and retention at 95 percent. Out of the 150 children

who participated, 143 graduated and eventually enrolled in mainstream primary schools. Of the seven who did not complete, one died, four relocated, one enrolled later and one was not traceable. Furthermore, thirty of the 143 children (21 percent) that enrolled in mainstream primary school were orphans.

Factors attributed to the success of the Soma-Soma Programme
Views and perspectives on why children were not attending school were obtained in community dialogue meetings and possible solutions to address the problem were discussed with the community. For six months the Soma-Soma team met and sensitised parents on the need to enrol children in school. Their approach was that 'there is also life in being a refugee and living as a refugee'. The message was well received and attracted more and more parents to the meetings. More mothers than fathers attended, partly because there are more women than men in the settlements, but also because men in Africa generally tend to relegate such responsibilities to the women.

While emphasizing the unique and professional position of Social Work in enhancing social inclusion of refugee children in education, Thomas recommends a human rights and social inclusion approach that holistically includes every stakeholder involved in the refugee children's education (Thomas, 2016). In this case study stakeholder input involved each village forming five member committees to act as 'power centres' for further mobilisation and support to the Soma-Soma initiative. The committees had the support of both local leaders and instructors in delivering the programme for the community. 'They could oversee our program to check whether the instructors have attended and check on the parents who seem to be complicated' said one instructor.

Soma-Soma programme Instructors came from the refugee community itself. They were identified by the community members as being suitable and qualified for the work and were paid an allowance. They knew the children, their parents/caregivers and their various circumstances. Part of their job was to maintain communications with parents to ensure their support for the children's attendance. They were able to make

direct contact with children and families in their homes in the event of absenteeism.

Parent workshops were part of the effort to keep the children in school. These involved sessions on the importance of education as well as on the role of parents in contributing to learning and on ways of keeping children in school (see photographs below).

Photograph 1 Parents and caregivers attending a meeting organised to discuss issues in the Soma-Soma programme in a classroom block under construction by the community members.

Mothers were said to be more enthusiastic about attending meetings than fathers. One of the explanations for this was that around 65-70 percent of the refugee households are headed by women, the men/fathers having died in conflicts/wars. In Nakivaale, our interviews revealed that Rwandan Refugees have fewer male-headed households than other nationalities. The other reason for limited male involvement relates to an earlier observation, that men consider children's education a mother's job. One respondent commented:

> most men are taken to drinking alcohol and are uninterested or not even able to attend the meetings because most of our meetings and our engagement with parents are always in the afternoon…. But some men are just adamant; they just don't want to go. They often argue that children are best managed by their mothers.

She added that '…we cannot convene our meetings in the morning if we are interested in big turn-up because the people use the mornings to attend to their gardens.' In response to the

lack of male attendees, the Soma-Soma team decided to organise one meeting for fathers only, to enable them to speak freely, to tell their stories differently, and even to air issues around domestic violence.

Lessons from the Soma-Soma Programme
The review of literature indicates how in various refugee settings, parents and guardians of children have embraced initiatives to enrol and start their children on an education or learning programme. However, the extent to which such initiatives yield long-term learning and children's retention in school is reported to be low. The success of these initiatives also depends heavily on external support from relief agencies, as well as on the nature and extent of refugee parents' sense of security in their new locations. The Soma-Soma experience underscores the importance of building and strengthening an engaged refugee community for enhanced education outcomes. The 95 percent retention of children in the first cohort of the Soma-Soma programme was a collective effort of parents, teachers/instructors and children. The initiative was premised on the fact that enrolment is only the first of the many steps in children's formal education attainment, in both refugee and host community contexts. Soma-Soma instructors work with the children, their teachers and their parents to make sure the children effectively participate in learning in their initial months of formal schooling. Instructors visit the homes of each child and also talk to the teachers in the schools where the Soma-Soma graduates are enrolled to identify any issues that potentially inhibit learning and need to be addressed. In Rubondo community, for instance, instructors identified a child with hearing difficulties and another who lacked decent clothing. These were impediments to their school attendance and required immediate redress to ensure that the children remained in school. Past studies have shown that if schools are supported, they can provide education that is fully inclusive for refugees (Block et al., 2014).

Facilitation of partnerships between schools and agencies can provide a holistic model for a whole-school approach, focused on the learning and on the social and emotional needs of students

with a refugee background. The pilot class of the Soma-Soma has demonstrated that a community-based, non-formal program with local instructors and parental support can successfully prepare refugee children for enrolment in formal primary education while promoting awareness and attitude change among parents, caregivers, and the entire refugee community regarding the importance of education.

Parents of refugee children can be empowered to keep their children in school (Wambi, 2020) by creating a parent liaison position, tapping into existing community service organisations and providing parent education programmes as useful strategies (Rah, Choi and Nguyễn, 2009).The Soma-Soma initiative in Nakivaale refugee settlement provides an important model for understanding how refugees can organize themselves to respond to gaps and achieve good education outcomes for their children. The lessons learned in the pilot phase of the programme could be used to scale-up the initiatives to target other communities, including host communities.

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James Ekene Obi

(Names of people and places have been changed)

Adebiyi's Story

Adebiyi was the first-born son of a noble family in Ogun State (Nigeria) – his father was the local Chief. Tradition dictated that he would become the next Chief – the title and position are hereditary. He knew from an early age that he was gay.

When Adebiyi was at University he fell in love with Simon – a fellow student. The two became partners. After completing their studies, Simon stayed behind in Lagos to look for work, and Adebiyi returned to his village. His family had arranged a marriage to the daughter of a prominent local family. Marriage was a prerequisite for him to become the next Chief.

During the Easter weekend, Simon came to visit him. His future wife also came. She came to call the two of them for lunch. When she opened the door to their bedroom, she found them locked in an intimate, tender embrace. Horrified, she ran out of the room, to call his parents. Chaos ensued. Adebiyi had no choice – he confessed to his parents that he was in love with Simon, and that they had been in a relationship since the time they had met at university.

The family chased Simon away and told Adebiyi to wait in his room until they had made their final decision. After two hours, they called him in. In a grave voice, his father informed him of their decision. This was an extremely serious situation. As the local chiefly family, they had a duty to preserve the family's honour, and to preserve the community's culture. His brother could only become chief if Adebiyi was no longer alive. There was therefore no option. He had to die.

The family had managed to obtain a vial of poison. Adebiyi had to drink it. But not in the house – it had to be done in a remote place, so as to look like a suicide. When the sun set, the father and uncle loaded him into their car. They drove out, away from the

village, past groves of tall coconut trees waving in the evening breeze. Five kilometres outside the village, they reached a lush field of cassava plants. They all got out of the vehicle. They marched him to the further end of the field and made him sit on the ground. His uncle took out the bottle of poison, and a pistol. 'Drink this. If you don't, we will have to execute you' said the uncle.

Adebiyi was staring death in the face. He took the bottle of poison and drank it. As he was losing consciousness, the last thing he saw was his father and uncle, walking away, getting into the car and driving off, without so much as a backwards glance. It was Good Friday. An hour or two later Adebiyi was found by four women from the nearest village. He was lying unconscious on the ground, foaming at the mouth. They ran back to the village, arranged a car from a neighbour, loaded him in and took him to the nearest hospital His stomach was pumped out. He was kept over night. The next morning the doctor asked him why had had taken the poison. He said that he had tried to commit suicide but would not divulge the reason. When he was stable, the doctor transferred him to the Federal Neuro Psychiatric Hospital in Yaba, where he was admitted.

Adeola's Story

Adeola was short, but decidedly masculine. She came from Abeokuta, in Ogun State. She had grown up there and had stayed there all her life. As a high school student, she had started the first woman's football club in Abeokuta. She had a love for cars and engines. After completing school, she did an apprenticeship as a mechanic, and opened her own workshop.

Her neighbours had mixed feelings. In a soccer mad country like Nigeria, local people will support a champion football team. And she was by far the best mechanic in the town, therefore everyone brought their cars to her to fix. But rumours were flying around about her sexuality, made worse by the fact that she was never seen with a boyfriend. Was she trying to prove that she was a man by captaining a football team and becoming a mechanic? To make things worse, she always wore trousers and T-shirts.

One evening she was in her room, washing her overall for the next day. There was a knock on the door. When she opened the door, three men wearing masks were standing outside. They were tall and muscular, and dressed in overalls. All three reeked of alcohol. They pushed her out of the way and forced their way in. At first, she feared that it was a robbery. Her business was doing well, but she paid all her money into her bank daily. But it was worse than that.

'What do you think you are?' demanded the leader of the group. 'Do you think you are a man? We know that you are a lesbian. But we will cure you of that today'.

'Do you think a finger can satisfy you the way a dick can?' asked the second one. 'You have never been fucked by a real man before. Today you will see what you are missing'.

She tried to scream, but they were on top of her, pressing her down on her bed. One was covering her mouth with his hand, to keep her quiet. They tore off her overalls and panties, leaving her naked. One by one they took off their pants, and raped her, taking turns while the others held her down.

When the last one had finished, they pulled up their pants. Tears were streaming down her cheeks, and blood was running down her legs. She was shivering from the shock.

'See how nice that was' said the leader 'we will be back again'. And with that they left.

Adeola feared for her life. She couldn't stay in Abeokuta. She knew they would be back. For all she knew, they could have been neighbours, old school mates or customers at her workshop. She would never feel safe, knowing that there was so much hatred directed towards her behind her back. And this was Nigeria – nobody would stand up for her.

The following day she packed her mechanical tools in her car and headed for Lagos. She had a friend who lived in Ikeja, who welcomed her.

The end of that month, she missed her period. With a feeling of despondency, she went for a pregnancy test. Her worst fears were confirmed – she was pregnant. At the clinic in Ikeja, she did the unthinkable – she asked for a HIV test. More bad news – it was positive. She started taking antiretroviral treatment immediately.

Eight months later she gave birth to a baby boy. The child was HIV negative. 'I love my child' she said 'but I have not been able to heal. Every time I look at him, I am reminded of the gang rape. And every time I take an ARV tablet, I am reminded of it.'

Ali's Story

Ali came from Mogadishu (Somalia) – in fundamentalist Muslim territory.

Ali was beautiful. He had wanted to be a girl for as long as he could remember.

His father owned a grocery shop. Ali was the store manager.

One of his regular customers was Ishmail – a young man his own age, with an engaging manner and a sharp sense of humour. They became friends, and started to meet after the store closed, to have dinner together and talk.

One evening, Ishmail said to Ali 'You are so beautiful, if you were a woman, I would have married you'.

'And you are so handsome, if I were a woman I would have agreed' replied Ali.

From there onwards they became lovers.

In Somalia same sex relationships are conducted in the utmost secrecy. People began to talk when they saw Ishmail going to the shop every evening. They were under constant surveillance. Eventually they were caught out by customers that were beginning to spy on them.

Without wasting time, they were hauled in front of a Sharia court. They could not deny the truth – they were in love. 'But Allah is compassionate and merciful'.

'Allah also doesn't tolerate abominations' replied the presiding officer. 'The punishment prescribed for homosexuality is as follows: the two of you will be taken out into the desert. You will have to dig your own holes and get into them. You will then be covered with sand until only your heads stick out. You will then be stoned to death by the elders of the community'.

The Islamic law enforcers have their own detention cells, where Ali and Ishmael were kept until the day of the execution. But anything can be bought by those who have money. Ali was

known to be the manager of his father's shop – a profitable business.

On the second night of their detention, around 8pm, the guard approached him. Whispering through the bars of the cell, he said: 'If you can arrange 500 US Dollars in cash, I will let both of you go. But then you must flee Mogadishu and never be seen here again'.

Ali agreed. At midnight, the guard unlocked his and Ishmail's cell doors. Under the cover of darkness, they left, accompanied by the guard. Ali knew where he hid the keys to the shop. He opened the door, went inside, took 500 US Dollars from the cash register, and gave it to the guard.

'Don't worry about me' said the guard. 'I will think out a story'.

There were some clothing items for sale in the shop, besides the groceries. Ishmail and Ali both got dressed in full burkas, to disguise themselves. They took the remaining cash from the safe and fled.

They made their way to Nairobi (Kenya). They had taken enough money from the safe to rent a room and to start a small tuck shop to keep themselves alive.

But nothing remains secret for long. Nairobi was not far enough away. They were spotted in the streets by some Somalis, who reported the matter to the Mogadishu Sharia court. The Sharia court issued a Fatwa – Ali and Ishmail were to be put to death.

It was late afternoon about two months later. Ali and Ishmail were walking down a crowded street in Nairobi. As they stood at a traffic light waiting to cross, they saw a car, which had been following them from behind at a distance, suddenly accelerate. It drew up parallel with them. In the front were two masked men. The one sitting in the passenger seat pulled out a pistol, aimed it at Ishmail, and shot. He did not stop shooting until the cars behind began to hoot. Then they sped off. Ishmail collapsed in a hail of bullets.

Ali feared for his life. In the confusion of the gathering crowd, he managed to slip away. Not waiting to see what would happen, he packed a bag, took all the money he had, and made his way to Johannesburg – the only place in Africa where he felt he would be safe.

Challenges Faced by LGBTI Refugees

Although names and places have been changed to protect identities, the above three stories are actual cases that I dealt with in Johannesburg. There are only four countries in Africa where it is legal to be LGBTI – South Africa, Botswana, Mozambique, and Angola. In the rest, sanctions range from five years in prison, to fourteen years in prison (as in Nigeria) to death by execution (as in Northern Nigeria). In some countries (as in Zimbabwe) you have to be 'caught in the act'. In others, simply being LGBTI will land you in jail. There is no sign of progress. At the time of writing, Ghana is enacting legislation making it a crime just to be gay. In Tanzania there is an anonymous hotline where you can report suspected LGBTI persons. In many countries it is a crime not to report LGBTI persons you know to the police.

The reasons for the pathological homophobia of almost all African societies are varied. One would have thought that citizens have more pressing needs to worry about than the gender non-conformity of less than 10 percent of their populations – abject poverty, famine, disease, corruption, repression, and war to name a few. But this is not the case. The local newspapers are filled with reports of same-sex couples caught 'in flagrante delicto' and sent to jail. In Uganda LGBTI people are regularly 'outed' (with photos) in the press. In Uganda there were mass protests when Museveni abolished the death penalty in the anti-gay act while it was being debated in Parliament – the population wanted the death sentence retained. And at the time the proposed Act was being debated, the Speaker of the Kenyan Parliament suggested that Kenya should follow suit, saying that 'homosexuality posed a greater threat to Kenyan society than Al Shabaab terrorism'.

Many LGBTI Africans, who do not have the means to make it to North America or Europe, end up fleeing to South Africa. It is the only country on the continent where LGBTI rights are protected in the Constitution, where same sex marriage is legal and where 'persecution because of sexual orientation in the country of origin' is a grounds for being given refugee status. Despite this, South Africa is far from being a safe haven for LGBTI Africans.

Firstly, refugees rely on their compatriot communities to survive in their country of asylum. LGBTI refugees cannot. Their compatriots are as homophobic as the communities in their home countries that they fled from. They are assaulted and ostracized.

Secondly, South Africans are generally not homophobic. But they are deeply xenophobic – even the LGBTI ones. LGBTI South Africans often regard LGBTI foreigners as scammers and criminals, who come to South Africa to practice prostitution. LGBTI people from other African countries are not welcomed into the community. This means that LGBTI refugees are completely on their own, with nobody to turn to.

Thirdly, despite the provisions of the law, LGBTI refugees encounter institutionalized homophobia at the Department of Home Affairs refugee reception centres. They are often told to 'prove that you are gay/lesbian'. Some have been in the country for as long as 15 years, and still have not been granted refugee status. When they go to Home Affairs to apply for an asylum seekers' permit or to have their permit renewed, they are interviewed (in violation of the law) with groups of their compatriots. As a result, they are afraid to reveal the grounds for their asylum application. There have been many incidents of LGBTI refugees being assaulted in the Home Affairs offices by their countrymen.

Fourthly, the UNHCR is supposed to offer protection to refugees and asylum seekers. But directives from UNHCR in Geneva to regard LGBTI refugees as a group of concern are generally ignored. The fact of the matter is that UNHCR in Pretoria is staffed by Ugandans, Zimbabweans, Nigerians and other African nationalities, where homophobia is not only prevalent but is almost considered to be a religious or moral duty.

Recommended Interventions

Working with LGBTI refugees presents the social worker with great challenges. What can be done? At an institutional level, social workers should engage with UNHCR, to ensure that it fulfils its protection duties. The attitudes and actions of UNHCR staff must be carefully monitored. Where there is evidence of a homophobic negligence of duties, it should be reported

immediately to headquarters, and action should be taken. Preferably UNHCR staff should be meticulously screened before being sent to South Africa – those who show signs of homophobia should not be sent to a country with such a large LGBTI refugee community.

Social workers should also work at the institutional level for the South African Department of Home Affairs to fulfil its legal obligations. Social workers should accompany LGBTI refugees to the Refugee Reception Offices to ensure that they are given a fair hearing and that their rights are not violated. Preferably, LGBTI refugees should be interviewed in a private room, by LGBTI Home Affairs officials.

On a personal level, social workers should bear in mind that they are dealing with profoundly damaged clients – many have experienced ostracism by family, Church and community. Many have been victims of recurring assaults and lynching. Many have spent months in overcrowded, filthy, violent prison cells. They have no self image, and no sense of belonging. The social worker should help them build confidence and self esteem, and foster community amongst them. Most are in need of trauma counselling.

Finally, economic empowerment is key to the successful integration of LGBTI refugees into society. South Africa has an unemployment rate (post Covid19) of over 40 percent. The asylum seeker permit entitles them to live and work in South Africa. It is valid for three months at a time, after which it has to be renewed. Even if an LGBTI asylum seeker is lucky enough to find a job, no employer will employ a person who only has residence status and the right to work for three months at a time. Consequently, LGBTI refugees and asylum seekers are forced into prostitution, as the only means of survival. This exposes them to HIV and STD's – further aggravating their vulnerability. In theory asylum seekers are entitled to medical treatment in government facilities. But in practice, they are often denied access, with hospital clerks saying that only patients with South African identity documents are allowed. A vigorous livelihoods program is needed – focusing on skills development and micro credit for small businesses. In a program of this nature, indigent LGBTI

South Africans should also be included. This will foster mutual acceptance and improve the social integration of LGBTI refugees into local society.

The challenges appear almost insurmountable. But a social worker opting to work with the LGBTI refugee / asylum seeker community has a unique opportunity to make exponential changes to the lives of one of the most vulnerable and marginalised sectors of the refugee community.

PART III: INTERVENTIONS

12. INTERROGATING MIGRATIONS AND SOCIAL TRANSFORMATIONS IN AFRICA: A SOCIAL WORK PERSPECTIVE

Ndangwa Noyoo and Mziwandile Sobantu

Introduction

In the last decade, there have been widely publicised accounts by Europeans and others, of African migrants making their way to Europe. The world has now become accustomed to media images of mostly young Africans crossing the Mediterranean Sea *en route* to Europe. Equally and disturbingly, scenes of capsised rickety boats and floating bodies of Africans on the high seas have been beamed all over the world (Flahaux & de Haas, 2016; Dovi, 2017; Achieng, El Fadil & Righa, 2020). Inevitably, such unfortunate events set in motion other activities or developments in the 'receiving' countries, for instance, the ill-treatment of the migrants by either the authorities or local people. New political developments and social discourses fed by media hysteria, based on half-truths and stereotypes of African migrants, have emerged in many parts of Europe in the said period. In many European countries where the African migrants arrive, the authorities and local populace are not willing participants in receiving and looking after them. The former are reluctant parties in meeting the needs of the migrants. In some countries such as Italy and Greece, Africans arriving via the Mediterranean Sea have been turned back and told to return to their countries. The rise in migration across the Mediterranean Sea has given birth to a particular narrative in the political and media arenas of European nations which have led to the tightening of immigration regulations and stringent border restrictions. In the aftermath of such actions, there has been a rise in political rhetoric, aimed especially at African migrants, which has given birth to the rise of far right or right-wing political parties in both Western and Eastern Europe.

Such rhetoric and inflammatory language and discourse has resulted in the hardening of, not only borders, but attitudes on the part of ordinary Europeans. In fact, we argue in this chapter that such discourses emanating from European nations,

culminated in the United Kingdom (UK) leaving the European Union in January 2020, in a move that has now come to be known as Brexit (Taha, 2019). In this regard, we interrogate in this chapter migrations and social transformations in the recent past, from Africa to Europe. Using Discourse Analysis, we examine the foregoing issues from a social work perspective. The chapter particularly focusses on African migrants because of the positionality of the authors. It brings into sharp focus some of the assertions by certain sections in European nations, towards the said migrants. The chapter begins by outlining the methodology used by the authors to interrogate the foregoing issues and arrive at its conclusions. It then unpacks the conceptual issues and proffers a backdrop and context to the issues under examination. The authors show how language provided meaning to political actions in European nations (and continues to) as they responded to the rise of migrants from Africa arriving on European shores. The chapter then brings into the discussion the role of social work in providing solutions to the way African migrants are portrayed in European discourses, and suggests how there could be better human relationships between the migrants and citizens of host countries.

Methodology

In this chapter, we decided to use the methodology of Discourse Analysis (DA) to unravel some of the issues that pertain to African migrants' movement from Africa to Europe, particularly how they are perceived and treated by the host countries. We took this approach because we suspected that their plight is given meaning by certain segments of European countries that do not have their well-being at heart. Some of the discourses in those countries have ended up labelling them in a negative way, leading to the creation of undesirable attitudes from the citizenry of European societies. According to Kamalu and Osisanwo (2015) its discourse Analysis is a broad field of study that draws some of its theories and methods of analysis from disciplines such as linguistics, sociology, philosophy, and psychology. More importantly, discourse analysis has provided models and methods of engaging with issues that emanate from disciplines

such as education, cultural studies, communication and so on. Furthermore:

The term 'discourse analysis' was first used by the sentence linguist, Zellig Harris in his 1952 article entitled 'Discourse Analysis'. According to him, discourse analysis is a method for the analysis of connected speech or writing, for continuing descriptive linguistics beyond the limit of a simple sentence at a time. A simple way to define discourse analysis is to say that it is 'the analysis of discourse'. The next question, therefore, would be 'what is discourse?' Discourse can simply be seen as language in use. It therefore follows that discourse analysis is the analysis of language in use. By 'language in use', we mean the set of norms, preferences and expectations which relate language to context (Kamalu & Osisanwo, 2015, pp. 169-170).

To interrogate the 'framing' of African migrants, especially those who were capsising on the high sea and arriving on the shores of European nations, while looking quite wretched, we thus chose Discourse Analysis to add content and meaning to some of the discursive interpretations of European media, politicians, or ordinary people *vis-à-vis* African migrants. The aforementioned can all be subsumed under the broad ambit of 'Discourse'. Thus, van Dijk (2018, p. 229) observes that there are many genres of discourse, such as (many sorts of) informal conversation, news reports in the press or on television, parliamentary debates, party propaganda, many types of legal (laws, interrogations), political (speeches of politicians) or educational (textbooks, classroom interaction) discourse, advertisements, Twitter or Facebook messages, and so on. These genres are defined in terms of the properties of the communicative situation or context, such as Who, When, Where, for Whom and How the discourse is used, as well as by their style or meanings (Van Dijk, 2018).

Discourse analysis is not just being employed in this chapter broadly, but it has been narrowed down to Migration Discourse. According to van Dijk:

The complexity of discourse as a linguistic, social, political and cultural object or phenomenon also characterises

migration discourse, which represents a vast class of different discourse genres. The class of these genres is primarily defined in terms of their reference, that is, what they are about: the many aspects of migration as a social and political phenomenon. Other general classes of genres of discourse are, for instance, political discourse, media discourse or educational discourse. News reports, editorials, parliamentary debates, laws, or everyday conversations are among the many discourse genres that may be about migration in general, and related phenomena, such as migrants (Them), autochthonous peoples (Us), causes of migration, integration, xenophobia, discrimination, racism, immigration policies, and so on (2018, p. 230).

Taken further, Migration Discourse not only may be about migration or its many aspects but may also be a constituent part of migration as a phenomenon, as would be the stories of migrants, as well as parliamentary discourse on immigration policies. Contemporary discourse studies emphasise this fact, namely that discourse is not just a form of language use, but also a form of social and political (inter) action (van Dijk, 2018, p. 230). Thus, migration as a social phenomenon not only consists of (groups of) participants, institutions, many types of social and political (inter)action, but also, quite prominently, many genres of migration discourse as social and political acts and interaction (van Dijk, 2018).

Conceptual issues
Migration is a complex phenomenon with major impacts on economies and societies. Attitudes towards migration may depend on its direction, size, and composition (e.g., religion, culture, nationality) (Katarzyna & Agata, 2018, p. 188). The distinction made by de Haas helped us to frame our discussion:

First, it is useful to make a distinction between irregular entry and irregular stay. For instance, most irregular migrants enter destination countries legally, but

subsequently overstay their visas, or engage in prohibited work, through which their status becomes irregular. The other way around, migrants entering or residing in a country illegally can acquire legal residency through obtaining work, marriage or regularisation. In the case of overland migration from West Africa, migrants cross many countries, some of which do allow their entry, some of which not, so that a migrant moves in and out of formal regularity and irregularity. We will define irregular migration in a broad sense as 'international movement or residency in conflict with migration laws' (2008, p. 13).

For the purpose of this study, we employed a narrower definition, focusing on the actual process of migration: 'crossing borders without proper authority, or violating conditions for entering another country'. We adopted the de Haas definition of the term 'migrant' to include both labour migrants and refugees (2008). We located the phenomenon of migration in the broader concept of social transformations. According to the United Nations Educational, Scientific and Cultural Organisation (UNESCO) (2021) the world is presently undergoing important social transformations, driven by the impact of globalisation, global environmental change and economic and financial crises, resulting in growing inequalities, extreme poverty, exclusion and the denial of basic human rights. These transformations demonstrate the urge for innovative solutions conducive to universal values of peace, human dignity, gender equality and non-violence and non-discrimination. Young women and men, who are the most affected by these changes, are hence the principal key-actors of social transformations. For Rabie (2013), social transformation means the restructuring of all aspects of life; from culture to social relations; from politics to economy; from the way we think to the way we live. Through time, societies have been transformed from small associations of individuals tied together by instincts, need, and fear; to small communities tied together by circumstances, kinship, traditions, and religious beliefs; to nations tied together by history, politics, ideology, culture, and laws (Rabie, 2013). But for most of human

history, the pace of change was very slow; no transformations in life conditions could be felt for several generations (Rabie, 2013). Since 2020, the world's social transformations have been negatively amplified by the Coronavirus (COVID-19) pandemic. In this chapter, we are using a global definition of social work which was approved by the International Federation of Social Workers (IFSW) and the International Association of Schools of Social Work (IASSW) at their General Assembly in July 2014. According to the IFSW and IASSW (2014), social work is a practice-based profession and an academic discipline that promotes social change and development, social cohesion, and the empowerment and liberation of people. Principles of social justice, human rights, collective responsibility, and respect for diversities are central to social work. Underpinned by theories of social work, social sciences, humanities and indigenous knowledge, social work engages people and structures to address life challenges and enhance well-being (IFSW & IASSW, 2014).

Backdrop and context: Africa and migrations
Migration of populations in Africa, either within or out of the continent, is not a novel phenomenon. It is something that has been ongoing for thousands of years. Castles, de Haas, and Miller (2013) argue that large-scale African migrations started around 200,000 years ago, after technological innovations had allowed populations to increase in numbers and expand. The authors note that migration on the continent unfolded in three stages, namely: pre-colonial, colonial, and post-colonial periods. In pre-colonial times, technological innovations (for example, among the Nubia/Red Sea region, which is the present-day Egypt and Sudan), linguistic origins and patterns (for example, the spread of Semitic and Berber languages from Ethiopia to the Horn of Africa as well as the spread of Nilo-Saharan languages to present-day Cameroon and to parts of South Africa), climate and ecological changes (due to droughts in the Sahara deserts) were responsible for migrations and constituted part of normal life of Africans (Castles, et al., 2013). In southern Africa, there was the dispersal of peoples from present-day South Africa who moved to Malawi, Mozambique, Tanzania, Zambia and Zimbabwe. These

dispersals, which culminated in the mid-1800s, were attributed to the rise of the Zulu nation, under King Shaka, in what was referred to as the *mfecane* (Zulu) or *difaqane* (Sotho) which means 'crushing', 'scattering' or 'forced' (Noyoo, 2019; Noyoo, 2021). From the Ndwandwe, under the leadership of Zwide, two groups migrated to other parts of the region. One group from this area was led by Zwangendaba and migrated to the area presently known as the Eastern Province of Zambia. Part of this group, who had become known as the Ngoni people, continued to Malawi and Tanzania where they settled. The other Ngoni group, under the leadership of Soshangane, went to establish the Gaza empire in present-day Mozambique. From present-day Free State province in South Africa, a group of Sotho people migrated northwards and settled in the kingdom of Bulozi or Barotseland, after subduing the Aluyi people who ruled this territory. This area is now referred to as the Western Province of Zambia. Lastly, one of Shaka's generals, Mzilikazi, while fearing reprisal from King Shaka for insubordination, fled with his followers to present-day southern Zimbabwe and established his Matebele kingdom at *koBulawayo* (present-day Bulawayo) (Noyoo, 2019; Noyoo, 2021). All these tribes that escaped Shaka's wrath also waged their own wars of conquest and subdued other tribes as they migrated northwards.

Arguably, the movement of Europeans to other parts of the world is not adequately interrogated when migration issues are examined by scholars and researchers. It is interesting to note that six centuries ago and thereafter, there were major migration waves from European nations to other continents, albeit referred to as 'explorations'. Such migrations eventually resulted in the colonisation of other continents and eventual establishment of permanent settlements by Europeans, far away from Europe. For other parts of the world, Europeans' migration to their lands had devastating effects such as the importation of diseases for example, smallpox or sexually transmitted infections like syphilis, that decimated whole populations. Nunn and Qian (2010) point to this era as the Columbian Exchange which was characterised by the swapping of diseases, ideas, food, crops, and populations between the 'New World' and the 'Old World',

following the voyage to the Americas by Christopher Columbus in 1492. Conversely, Europeans exterminated whole races of indigenous peoples or contributed to their almost extinction, through brutal subjugation and genocide. Furthermore, European settlements in these lands was typified by land grabs and the brutal oppression of the local populace. In Africa, the arrival of Europeans was also triggered by explorations. There were also missionary forays which were meant to convert Africans to Christianity.

Worthy of note, is that the spice and silk trade routes which early Portuguese merchants and explorers, such as Bartolomeu Dias in 1488, and later Vasco da Gama, had navigated, were long and arduous. Thus, the need for replenishment of vital provisions en route (Lester, 1998; Noyoo, 2019). The tip of the African continent proved very useful in this regard and would later serve as an outpost for Dutch merchants who used the same Portuguese trade routes. Due to this, the Dutch decided to create a permanent settlement in 1652 on the southernmost tip of the African continent. The Dutch East Indian Company built these settlements. This new group of European settlers would be pitted against indigenous communities in violent struggles of conquest, dispossession and eventual occupation of the land of the indigenous nations. With more Europeans coming through to this part of Africa, conflict with the local people increased. Such conflict was heightened when the Dutch East Indian Company released some of its workers to go and farm on the land of the indigenous people and then sell their produce to the company. Many of these *free burghers,* as they were called, clashed with the local Khoikhoi and San peoples (collectively referred to as Khoisan) (Lester,1998; Noyoo, 2019). Meanwhile, the British were also eyeing this part of Africa and, a hundred years later, an Englishman, Francis Drake, rounded the Cape (Lester,1998; Noyoo, 2019). Several centuries later, there would be a larger presence of Europeans in southern Africa than in any part of the continent, due to large deposits of minerals, arable land and temperate climate.

The consequences of the migration of Europeans to Africa were dire for its people. Their lives were altered forever in

fundamental ways. Africans were first enslaved and shipped to other parts of the world in what came to be known as the Transatlantic Slave Trade. Millions of Africans were uprooted from their lands, communities and families and forced to work in North American, South American and Caribbean plantations, while in Europe slaves worked elsewhere. After European settlements were permanently established in Africa, the colonisation of territories ensued. In the lead were the Portuguese and Dutch, and then the English and French. After the Berlin Conference of 1884 and 1885 (also referred to as the 'Scramble for Africa'), European nations, including Germany and Belgium apportioned themselves African territories. This migration of Europeans to Africa, and other parts of the world, transformed the world. Eventually, the British became leaders in the colonisation of other parts of the world and created the so-called British Empire. The British can be cited as having a penchant for transplanting populations from their birthplace to other lands. This reconfigured some landscapes around the globe in fundamental ways. For instance, in the case of Kenya and South Africa, it was starkly evidenced in the large numbers of people of Indian descent. In the former case, more than 30,000 indentured Indian workers were enticed to Kenya to build a rail line from Nairobi to Mombasa in the early twentieth century (Methu, 2014), while in South Africa, in the then province of Natal, Indians were brought to work on sugarcane plantations, also as indentured labour. Khan (2012, p. 133) reports that the British colonial trade in indentured labour destined for the southern tip of Africa was a weathered form of slavery, based on a voluntary contractual labour relationship. It was a more 'civilised' version of slavery which was abolished across the British Empire in 1833. Indentured labour took the form of a systematic and brutal co-ordination of capital accumulation, using predominantly the single sex system.

Contemporary times: Africans migrating to Europe
The present wave of migration of Africans to Europe is not of a forced nature as was the case during the slave trade. Many Africans are fleeing their home countries due to human induced

catastrophes such as civil wars, political persecution and authoritarian rule. The other reasons for leaving their countries are related to natural disasters such as floods, drought and the severe outcomes of climate change. Achieng et al. (2020) point out that Africans have always, and will continue, to migrate, and this seems only set to increase as current mobility trends emanating from national border posts demonstrate. Africans move in search of opportunity and, sometimes, safety. Their movement brings advantages to their families and communities, and therefore to their nations (Achieng et al., 2020). It is important to note that there has not been an upsurge in the migration of Africans south of the Sahara to Europe, in the past decade or so. Previously, migrations to Europe, and to other parts of the developed North, were characterized by the movement of highly skilled Africans in what came to be known as a 'brain drain' (Noyoo, 2017). The skilled migrants were mostly using legitimate avenues as they were lured to the developed North by prospective employers in various sectors. Thus, their movements were not seen as 'influxes' and were not captured and sensationalised by the European media, politicians, and general public in the way that the new wave of African migrants are.

According to Katarzyna and Agata (2018, p. 188) the number of migrants from African countries in 1950-2015 grew in absolute values, while the trends of the net migration rate were ambiguous. However, in the short term, after 2000, we can identify a constant increase in African emigration. This movement is especially visible and strong for the sub-region of North Africa, where the constantly increasing population outflow over the period 1950-2015 was consequently higher than the inflow and reached its peak in 2005-2010. Apart from North Africa, the number of Western and Eastern African emigrants also seems to rise over the period – especially after 2000. In the same period, the decline of the net migration rate indicates a general trend to emigrate within Africa (Katarzyna & Agata, 2018, p. 192). Nevertheless, the present migration phenomenon has been distorted by European nations for their own purposes. Achieng et al. (2020, p. 1) identify three fundamental facts that belie the current distorted narrative on African migration: (a) most African

migrants are not crossing oceans, but rather crossing land borders within Africa; (b) 94 percent of African migration across oceans takes on a regular form; and (c) most global migrants are not African. Achieng et al. (2020) further posit that Africa accounts for 14 percent of the global migrant population, compared, for example, to 41 percent from Asia and 24 percent from Europe. This evidence fortifies the need to retell the story that is largely about intra-African migration, contrary to the horrific sensationalised narrative of irregular migration from Africa through the Mediterranean.

The movement of African migrants to Europe is fraught with many perils. According to the UNHCR (2020) thousands of refugees and migrants are dying, while many are suffering extreme human rights abuses, on irregular journeys between West and East Africa, and Africa's Mediterranean Coast (generally Libya). Collecting accurate data on deaths, in the context of irregular mixed population flows controlled by human smugglers and traffickers, is extremely difficult. This is due to the fact that many take place in the shadows and away from the view of authorities and their formal systems for managing data and statistics (UNHCR, 2020). The men, women and children who survive are often left with lasting and severe mental health issues as a result of the traumas they faced. For many, their arrival in Libya is the final staging post on a journey characterised by horrific abuses including random killings, torture, forced labour and beatings (UNHCR, 2020).

Discourse matters: How African migrants are perceived and treated in Europe

Migration is about 'pull' and 'push' factors, meaning the need to search for opportunities outside one's own country is generally motivated by unsafe and difficult situations in that place, in most cases. Thus, people are compelled to go elsewhere for safety and so-called greener pastures. However, as disparities between rich and poor countries are growing, so too is the socio-economic gap between potential immigrants and hosts. Increasingly, high-income societies tend to refuse engagement in international problems and demand their governments concentrate on national

issues. Hence, openness towards immigration decreases (Katarzyna & Agata, 2018). According to Abebe (2020) migration from Africa to Europe is increasingly being framed as a security threat to states and societies. The result is tighter border controls and visa policies. These efforts have led to fewer African migrants reaching Europe but have also had several unintended negative consequences.

Flahaux and de Haas (2016) note that Africa is often seen as a continent of mass migration and displacement caused by poverty, violent conflict, and environmental stress. Yet such perceptions are based on stereotypes rather than theoretically informed empirical research. De Haas (2008) expands:

> Media and dominant policy discourses convey an apocalyptic image of an increasingly massive exodus of desperate Africans fleeing poverty and war at home trying to enter the elusive European 'El Dorado' crammed in long-worn ships barely staying afloat. The migrants themselves are commonly depicted as victims recruited by 'merciless' and 'unscrupulous' traffickers and smugglers. Hence, the perceived policy solutions - which invariably boil down to curbing migration - focus on 'fighting' or 'combating' illegal migration through intensifying border controls and cracking down on trafficking and smuggling-related crime. Although there has been an incontestable increase in regular and irregular West African migration to Europe over the past decade, available empirical evidence dispels most of these assumptions (2008).

The problem is that such ideas are based on assumption, selective observation, or journalistic impression, rather than on sound empirical evidence. The focus of media, policy and research on irregular migration, smuggling, trafficking, and the high death toll amongst trans-Mediterranean 'boat migrants' reinforces the impression that African migration is essentially directed towards Europe and driven by despair (Flahaux & de Haas, 2016). There is also the hardening of attitudes that emanates from this profiling

of African migrants and results in the 'othering' of this group by the Europeans. This 'othering' mainly emanates from language or discourse of politicians or the media. In their study of the Greek newspapers, Kathimerini and *Ta Nea*, Serafis, Greco, Pollaroli and Jermini-Martine Soria (2020) used an integrated argumentative approach to multimodal critical discourse analysis. Their purpose was to ferret out the following: (a) racist conceptualisations cultivated by the representation of migrants and refugees in headlines and photographs in newspaper articles along with (b) the argumentative potential that is implicitly sustained in these multimodal representations. This approach enabled them to compile evidence that showed how negatively refugees and immigrants were portrayed in Greek newspapers. While using socio-political discourse and a post-colonial and discourse analytical critique, Taha (2019) was able to focus on refugees, migrants, and citizens in the United Kingdom (UK) and then decipher why migrants and refugees were treated differently to citizens by the UK government. Taha's study took written statements from Members of Parliament and three online news sources to unpack the existing dominant discourse in the UK. The study concluded that the mistreatment of migrants and refugees is seen as legitimate because the national dominant discourse has constructed their societal identity as 'others', who pose a risk to the congruency of the state (Taha, 2019). However, the hardening of borders and attitudes is not just a European phenomenon. Abebe (2020) explains that in Africa, upper-middle-income countries such as South Africa, Botswana, Egypt, Algeria, and Morocco also apply strict visa rules to African travellers, to limit the entry of migrants from low-income countries.

While we are focusing on migration flows from Africa to Europe in this chapter, we are cognisant of other migrations across the globe. In particular, we are aware of how the movement of migrants from the Global South to the North has been framed in other parts of the developed North, particularly in the US. During the reign of the immediate past president of the US, Donald Trump, the migration discourse had reached fever pitch and raised temperatures to such an extent that violence was not far off whenever this issue was raised in the political arena. It

also shaped the way migration was handled by both the authorities and ordinary Americans. This all happened thanks to Trump's polarising and uncouth rhetoric, which also served as his main campaign vehicle in 2016, and which saw him winning the US elections of that year. Who can forget the derogatory assertions which were made by Trump when he accused Mexican migrants, and by association, those from Latin America more generally, as 'drug-dealers' 'criminals' and 'rapists'? This transpired when he announced his intentions to run for the presidency (Abbott, 2019). Equally disturbing were his utterances related to developing countries, and especially African countries, which he referred to as S***holes (Vitali, Hunt & Thorp, 2018). When he became president, Trump banned people from six Muslim counties from the US. This was after he had again made disparaging remarks about such countries.

Any role of European social work in the African migrant 'crisis'?
Social workers worldwide are currently confronted with enormous challenges in responding to the needs of people in contexts of forced migration, even though the migration phenomenon is as old as humanity. To this end, 'traditional' social work settings, previously linked to concrete local or national spaces are becoming more and more dispersive (Heiman & Roβkoph, 2021). According to Boccagni and Righard (2020) social work with mobile populations has been at the core of the profession since its very beginning. The early developments of professional social work occurred in societal contexts of industrialisation and urbanisation. Many, if not all, of the pioneering social workers of the late nineteenth century, worked with newcomers from the countryside or from other countries, not least the hordes of Europeans arriving across the Atlantic to America, the promised land in the West. Undoubtedly, some of these persons were refugees, although at that point in time refugees did not exist as a legal or political category. As such, refugees emerged in connection with the First and Second World Wars (Boccagni & Righard, 2020). Furthermore:

Social work with refugees and highly mobile populations has a complexity of its own. It involves different realms of expertise – socio-legal, no less than health and social care ones – and leaves little scope for helping relationships built up through protracted engagement with legally eligible clients. It involves, therefore, a critical understanding of the reproduction of structural inequalities, informed also by Refugee Studies and Forced Migration Studies, but also an understanding of racialisation and of its variations over space and time. In practice, it is far from desirable that social workers cope with this complexity only (or primarily) by learning-on-the-job, as several studies reveal (Boccagni & Righard, 2020, p. 381).

When we employed Discourse Analysis to examine the way African migrants have been portrayed, we were able to decipher that indeed, stereotyping of African migrants is a dominant feature in European societies. Therefore, what is discussed in the public domain and more importantly in the media, which is of course largely negative, has shaped public opinion across Europe. This has, in turn, resulted in less sympathetic attitudes towards African migrants from the citizens of possible host countries. If they make it and begin a new life in Europe, the African migrants are at a disadvantage due to this profiling. Also, they do not have support systems and have to rely on social workers who are usually employed by the state or the voluntary sector. When Africans migrate to Europe they transplant their value systems, cultures, mores, and traditions to the host countries. These values, traditions etc., are diametrically different to those of host countries in Europe. Also, the levels of education of the migrants is generally either very low or does not exist at all. Thus, in many cases, they do not have the requisite social skills to navigate the social contexts of European countries. The case of Finland is instructive here. According to Merja and Turtiainen (2021), social work in Finland, like in many other (European) countries, faced various challenges after the large scale of forced migration in 2015. Although working with migrants is not a new area in social

work, the exceptionally large number of asylum seekers in the Finnish society necessitated improvements in social work expertise. A study of social workers' reflections on forced migration and cultural diversity conducted by the authors, found that social workers saw communication skills in multilingualism and multiculturalism as being of critical importance (Merja & Turtiainen, 2021).

Social workers who participated in the study also identified the need for interaction skills when working with migrants and the need for greater knowledge, on the part of social workers, about forced migration and its challenges. This was needed to be able: (a) to ask relevant questions, (b) to understand the migrants' situations, and (c) to provide comprehensive and relevant help. The social workers interviewed also noted that they needed knowledge, and an understanding, of refugee and asylum application processes, national and European asylum laws and systems, human rights provisions, and the effect on migrants of precarious statuses and traumas (Merja & Turtiainen, 2021). We suggest that the situation in Finland is not dissimilar to that which exists in other European countries, when it comes to responding to the well-being of migrants, and especially African migrants. We also contend that African migrants face particular challenges because, in many European countries, the integration of migrants means their assimilation to a pre-existing, unified social order, with a homogeneous culture and set of values (Rudiger & Spencer, 2003). Integration is perceived as a one-way process, placing the onus for change solely on the migrants. They are expected to undergo a unilateral process of change, particularly in the public sphere, so that they can fit into a given order. For example, women of Turkish origin in Germany are often expected to work without headscarves when serving customers, as it is thought that customers could be alienated by such changes to staff uniforms. As differences cannot be tolerated, they are required to disappear (Rudiger & Spencer, 2003).

What Merja's and Turtiainen's study clearly identified was the unpreparedness of Finnish social workers to help migrants. In relation to working with African migrants in particular, who are contending with the negative stereotyping of them in European

countries, social workers need much greater training and support. There is a need for social work to counteract these negative attitudes. We suggest that, as a starting point, they to engage in the enhancement of human relationships between locals and African migrants. It needs to be borne in mind that social work is a human-centred praxis and consequently, it is carried out within a network of human relationships. Therefore, European social workers will need to foster informed human relationships with African migrants in the first instance (Noyoo, 2020). In addition, they need to develop skills and practice in the areas of anti-discrimination and diversity (Noyoo, 2020, Merja & Turtiainen, 2021). We also concur with the findings of the Merja and Turtiainen study which points to deficits in social workrer communication skills related to a multilingual and multicultural environment. European social workers need greater understanding of African migrants' histories and socio-political backgrounds to provide better services to them. Lastly, we recommend that they should play more of an advocacy role when they work with African migrants.

Conclusion

This chapter set out to bring to light the peculiarity of African migrants' plight in Europe, due to the way they are portrayed by the European media, political actors and authorities, and ordinary citizens. The characterisation of African migrants is, more often than not, presented in a negative light. Inevitably, this negative stereotyping has led to negative attitudes towards African migrants within Europe, thus making their stay there quite difficult. Arguably, the upsurge of the 'new' migration of Africans to Europe has caught the attention of the world because it involves mostly young and unskilled Africans, who fit the profile of 'undesirables' in Europe. Many European social workers were not prepared to deal with this new group of migrants and have ended up scrambling to meet their needs.

In this chapter we have highlighted the fact that people's words matter as they shape attitudes and eventually policies and legislation. We teased out the meanings and interpretations of a range of European actors' negative assertions about African

migrants and illustrated how they were able to shape public attitudes. We provided a contextual backdrop to the phenomenon of migration and show that African migration is not new, and has been happening for thousands of years. In interrogating the present migration conundrum of Africans to Europe and the perils associated with such movements, we considered the migration of Europeans to Africa and their colonisation of the region in past centuries. This resulted in the enslavement of Africans, their forced removal from their lands and their transportation to Europe, North and South America and the Caribbean in what came to be known as the Transatlantic Slave Trade. In the final part of the chapter, we dealt with how social workers have responded to this growing challenge in Europe and put forward some recommendations for improved social work practice with African migrants in Europe.

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13. FROM THE MICRO TO THE MESO: THE ROLE OF SOCIAL WORK IN DEVELOPING MIGRATION-AWARE HIV RESPONSES FOR YOUNG MIGRANT MEN IN JOHANNESBURG

Oncemore Mbeve, Thobeka Nkomo and Jo Vearey

Introduction

South Africa – long-associated with diverse population movements – continues to be faced by a prevalence of HIV, concentrated among young people. Research shows that sexual decision making contributes to the HIV risks that migrant populations are exposed to and that migrants, including those travelling within the country (internal migrants) and across borders, experience challenges in accessing HIV health services. This is particularly concerning in the context of Treatment as Prevention (TasP), including Test and Treat and pre-exposure prophylaxis (PreP). With reference to the social determinants of health risks, there are calls for HIV interventions to pay more attention to meso-level social processes that mediate HIV risks – such as migration[47]. In this way, it becomes possible to assess and connect both micro (individual) and macro (policy) level social processes that are fundamental to HIV interventions in the Southern Africa region. In this chapter we draw on a review of existing literature and policies; and a series of interviews[48] with migrant men in Johannesburg to examine the sexual decision-making of young migrant men. We then draw lessons that we will use to explore the role of social work and allied professions in both meso (policy) and micro (individual) level intervention efforts. These lessons will serve to inform both social work (in

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counselling and campaigning work), and broader policy development, to help improve the sexual health of young migrant men and other relevant populations, contributing to the development of migration-aware responses to HIV.

Background

MIGRATION AND THE POST-APARTHEID ERA

In 1994, South Africa (SA) became a democratic country. Subsequently, at a policy and constitutional level, migrants went from being excluded and discriminated against, to being welcomed (Hölscher and Bozalek, 2012). For example, the extremely migrant discriminatory Aliens Act 1 of 1937 was revoked and replaced with more welcoming legislation, such as the Refugees Act which was passed in 1998. The country's constitution also makes provision for ensuring migrants' access to social security and assistance (McConnel, 2009). As SA began to introduce migrant friendly legislation internally, it also moved to support progressive global conventions, protocols and human rights instruments governing migration. The country pledged to accept migrants, and to treat them in accordance with international humanitarian law standards (Kock, 2018).

Since SA moved towards more migrant friendly policies, it has experienced an increased flow of migrants, resulting from a variety of factors, including a better performing economy and political stability in the sub-Saharan Africa region (SSR). Although SA accepted the responsibility of migrants, the government pays little attention to migrant related issues, including those concerning the protection of their health (Hölscher and Bozalek, 2012). Instead, migrants' needs, and social services are often advocated for, and provided, by a small number of nongovernmental organisations (NGOs).

The South African government provides some general, and a few specialised, social services for migrants in urban areas. However, these services are far from adequate and reach only a small fraction of the entitled. This means a large proportion of migrants' needs remain unmet. The SA Constitution clearly states that everyone has a right to health care services, including sexual

reproductive health care. However, a combination of inadequate documentation, ignorance and outright discrimination ensures that many migrants are denied rights to critical health care and social services. Landau (2006) notes that although there are minor interventions in place, patterns of migrant discrimination in relation to health service access remain evident.

HIV IN THE SUB-SAHARAN REGION AND SOUTH AFRICA

The SSR has the majority of people living with HIV globally (Barnabas et al., 2020). In the region, SA continues to have the highest HIV prevalence rates. In 2019, UNAIDS estimated that 7.5 million people were living with HIV in the country (Temin et al., 2021; UNAIDS, 2019). Research also shows that the highest rates of HIV in SA are in urban areas, such as Johannesburg (Cane et al., 2021; Gibbs, Reddy, Dunkle, and Jewkes, 2020). At the same time, Johannesburg is the main destination for internal and cross-border migrants in SA (Statistics South Africa, 2019). Overall, within the SSR, young people are at the epicentre of the HIV epidemic and research demonstrates that they have persistently high levels of HIV incidence (George et al., 2020). While it is the casa that young women have higher HIV prevalence than men of the same age, young mens' viral repression levels are generally poorer.

The HIV burden in the SSR was exacerbated by the onset of the devastating Coronavirus (COVID-19) in 2019. As Joska et al. (2020), among others, shows, those living with HIV are more vulnerable and faced with additional challenges that include anxieties linked to the impact of a life-threatening infection on their well-being and that of their children. COVID-19 is also associated with increased domestic violence including GBV and IPV (Intimate partner violence), both of which have been associated with increased risk of acquiring HIV (Geller et al., 2020; Klazinga, Artz, and Müller, 2020; Stoicescu, Richer, and Gilbert, 2020). Lastly, the restrictions around COVID-19 may result in missed clinic visits to obtain medication, making those living with HIV more open to re-infection or increased viral load (Joska et al., 2020).

In its response to the burden of HIV, SA participates in a number of SSR interventions. These include programmes designed for community delivery of antiretroviral therapy (ART) including ART initiations and clinical and laboratory monitoring (Barnabas et al., 2020). Tirado et al. (2020) also, report on other interventions in the region at individual, community, and policy level. These interventions are implemented to benefit migrants and are relevant in reducing barriers to treatment and improving viral suppression (Barnabas et al., 2020). They are designed to reduce access barriers to Sexual, Reproductive, Health and Rights (SRHR) services at an individual level (such as comprehension, perspectives, skills and empowerment), social and community level (such as relationship power, GBV and norms), institutional and health systems level (such as basic principles, services, provider support and education), and structural (such as infrastructure and policies). Some of the interventions that have been used and found to be effective are educational projects within refugee camps, aimed to teach young people about SRHR, sensitization or training of peer educators, religious leaders, parents, and service providers (Tirado et al., 2020).

In peri-urban areas such as those in KwaZulu-Natal province (in SA) and Sheema District (in Uganda), trials have shown that Community-based ART increases retention of patients, including men whose viral repression is often low (Barnabas et al., 2020). This led to increased viral suppression, with the trial outcomes comparing very favourably with clinical hybrid approaches for ART (Barnabas et al., 2020). In addition, the community-based ART programmes are considered safe and more user friendly for service consumers.

MIGRANTS' ACCESS TO HIV HEALTH SERVICES

As has been pointed out, there are some effective responses to HIV among migrants and refugees, but the health of migrants continues to be compromised in various ways in the country or place of destination (Fan et al., 2020; Kavian et al., 2020). This is true globally, as well as in the SSR, including in countries such as Japan, whose universal health coverage is recognised as excellent (Shakya et al., 2020). Despite this, migrants have poor access to

Japanese health services, owing to a variety of socio-economic and behavioural factors. This, in turn, increases their vulnerability to HIV (Shakya et al., 2020).

In Mozambique, mobility has been reported to potentially yield poor responses to HIV care and treatment initiatives (Bernardo et al., 2021). For example, mobility in some parts of Mozambique has resulted in lapses in ART pickup and poor HIV care frequency (Bernardo et al., 2021). Similarly, in Uganda migrants are reported to experience compromised access to HIV care and uptake of treatment owing to structural problems such as: overcrowded living conditions that limit their private space for medication administration; high transportation costs; low literacy levels; and language barriers (Logie et al., 2021).

In SA, migration and related challenges such as xenophobia and structural inequalities (including gender, age, discrimination, limited social capital and economic dependency) create threats that may increase migrants' risks to HIV (Temin et al., 2021). Some of the specific challenges faced by migrants in SA that increase their risks of acquiring HIV include compromised access to health services, education, and social support (de Gruchy and Vearey, 2020; Temin et al., 2021). Migrant young people may also embark on early sexual relations, and engage in material exchange in relationships, which increases the risk of exposure to HIV (Temin et al., 2021). Bernays et al.'s (2020) findings show that young new migrants in KwaZulu-Natal (a SA province) poorly utilised the HIV health services, or even considered it as an option. The decision to avoid using the health services is despite the fact that their HIV risks are likely to be higher.

In response to some of the decisions made by migrants to sometimes not use the health services, and their sexual decisions, research has shown that young people's decisions may be influenced through monitoring of their behaviour. For example, Mpofu et al. (2021) show that in the case of young people with religious affiliation, their sexual decisions may mean abstinence, a decision that they make independently but that they create within the context of church. Furthermore, Anyanwu et al. (2020), show that the absence of good parental supervision 'may yield

poorer sexual and reproductive health (SRH) decisions and health outcomes.

THE ROLE OF SOCIAL WORK ON MIGRANTS' HEALTH NEEDS

Social work as a profession plays an important role in dealing with the various needs of its clientele. The profession has potential to contribute to improved outcomes in the area of HIV as its intervention strategies are are directed at a number of levels: individual, group, community and structural. There are also opportunities for social workers to use their skills and expertise in the implementation of HIV intervention programmes, such as DREAMS[49] (George et al., 2020; Govender et al., 2021). The involvement of social workers in such interventions is significant and can make a huge contribution to preventing the spread of HIV and to the reduction of the viral load. However, in SA, there is very little involvement of social workers and auxiliary workers in such initiatives (Tembo et al., 2020; Zibengwa and Bila, 2021). This is partly owing to the shortage of social workers and to the myriad of social ills that the limited number of social workers are deployed to.

At a global level, social work plays a critical role in the international debates around migrants and their needs (Hugman et al., 2011). This can be observed through the presence of different associations, such as the International Federation of Social Workers (IFSW), the International Association of Schools of Social Work (IASSW) and the International Consortium for Social Development (ICSD). These international associations form platforms for social workers to exchange ideas about migrants on a global level. Such platforms can be used very effectively to inform and enhance international policies and strategies, including the Global Compact for Migration, the aim of which is to support and promote regular global safe movement

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[49] The DREAMS (Determined, Resilient, Empowered, AIDS-free, Mentored and Safe) partnership is an ambitious public-private partnership aimed at reducing rates of HIV among adolescent girls and young women (AGYW) in the highest HIV burden countries.

of people (de Vries and Weatherhead, 2021; Oelgemöller and Allinson, 2020).

THE REMAINING GAP IN THE HIV RESPONSE IN SOUTH AFRICA

While there are high rates of HIV in the SSR, the viral suppression rates are relatively low, for example, SA's viral suppression rate remains at 54 percent and in Uganda at 64 percent (Barnabas et al., 2020). This means that HIV continues to be a real problem in the region and continues to pose a major challenge to health and other services. The problem is especially acute among young migrant men who are not engaging with treatment and prevention strategies in sufficient numbers. This is for a number of reasons, similar to those outlined earlier (missed wages, costs and long waiting times for clinic visits) (Barnabas et al., 2020). A further barrier, particular to young men, is that they are less likely to seek care owing to gender norms and stigma (Barnabas et al., 2020).

SA is a signatory to many international goals and policies with commitments to global development and eradication of diseases, including HIV. In its efforts towards universal health coverage and meeting the UNAIDS 90-90-90 targets, SA is implementing universal test and treat (UTT) interventions, antiretroviral treatment as prevention (TasP) interventions and pre-exposure prophylaxis treatment (PreP) (de Gruchy and Vearey, 2020). Despite this, the rate of HIV remains high in SA and the SSR at large, and migrants experience greater challenges. Approaches that lead to an improvement in the implementation of these interventions and improved access for migrants are of urgent need.

Methodology

The empirical findings presented in this chapter are extracted from a bigger study conducted by one of the authors for his Ph.D. research project. The study employed a qualitative approach which allowed for probing and enabled a deeper understanding of sexual decision making by young migrant men. The study was conducted in the Johannesburg's inner-city since it is one of the main destinations of both internal and cross-border migrants in the African continent. Ass well as providing a valid case study,

the level of migrant population also made it easier to access participants.

Some participants were recruited through an inner-city organisation and the remainder were identified through snowball sampling. Migrants are considered a hard-to-reach population when conducting research but, this research approach, involving referral by a friend or known individual, aided identification and created a level of trust. The approach also worked well in terms of minimizing both the amount of travel involved in recruiting participants and the level of unnecessary contact. This was also useful in the context of COVID-19 restrictions.

Ultimately, twenty participants were interviewed, eleven Zimbabwean and nine South African. Although the aim for the Ph.D. project was to recruit 32 participants, the context of COVID-19 restrictions made that difficult. It was also intended to conduct interviews face-to-face, but this was not possible under Covid restrictions. Thus, the interviews were conducted by telephone. Out of the twenty participants interviewd in the original study, we are using data from only ten of those in this chapter (see Table 1 below).

The study participants were all young men. The Zimbabwean participants originated from cities, while the South African internal migrants had moved largely from rural areas to Johannesburg. Most of the South African participants were professionals who had moved to the city to seek professional opportunities (Mubangizi 2021; Weinreb et al., 2020).

Table 1: Demographic information of the participants for this Chapter.

Name	Age	Place of origin	
Zimbabwean participants			
Khaya	30	Bulawayo	City
Munya	26	Harare	City
Tendai	23	Harare	City
Bangi	25	Bulawayo	City
Tanaka	28	Chinhoyi	Town
South African participants			
Nkosi	29	Mpumalanga	Rural
Tshepo	30	Gaba, Limpopo	Rural

Jabulani	26	Mpumalanga, Breyten	Rural
Senzo	28	King William's Town, Eastern Cape	Rural
Sipho	25	Eastern Cape	Rural

To collect data, a qualitative semi-structured interview schedule was utilised. Telephone interviews were conducted on a one-to-one basis through the languages of English, IsiNdebele and Chishona. Thematic analysis was used to analyse the data, using six specific steps: (1) familiarisation with the data, (2) generation of initial codes, (3) search for themes in the data, (4) review of the themes, (5) definition and naming of themes (see table 2), and (6) generation of Chapter (Braun and Clark 2006)

Findings and discussion
The findings are divided into themes as summarised in the table below:

Table 2: Summary of the findings.

Theme	Summary
Availability of contraceptives	Although there are some access challenges, condoms are commonly available in the Johannesburg inner-city area. This is unlike the situation that would have existed in the young men's homes of origin.
Perceptions on condoms	Young migrant men's knowledge of the use of condoms is high. However, there are various decisional factors that affect the actual usage of the condoms, such as: (1) the condom brand (2) the source of the condoms, (3) trust of the sexual partner, and (4) the reason to use the condoms.
Avoidance of responsibility	Young migrant men may avoid taking responsibility for the practice of protected sex and blame it on their environment (Johannesburg inner-city). They may also expect their sexual partner to take responsibility for their sexual health. These behaviours seem to affect the progressive implementation of sexual health practices among young men.

AVAILABILITY OF CONTRACEPTIVES

Migrant young men's narratives demonstrated a notion that condoms were either less available or hard to access in their home of origin, thus yielding poor uptake. This was summarised by Munya, speaking of the circumstances in his home region: 'It is a bit difficult to access condoms. People usually buy condoms and do not get them for free. They are quite pricey, yeah, they are quite pricey.'

This was the view of Munya, who came originally from a Township in Harare, and whose migration to Johannesburg inner-city was to seek better economic opportunities. This is the same for other migrant young men in this study, which suggests that their economic circumstances in their home regions may have been poor, severely limiting their ability to pay for condoms. Studies demonstrate that young people in such contexts have poor to no access to contraceptives owing to various challenges including cost (Wado et al., 2020).

Another factor that seems to limit young people's access to condoms and other contraceptives such as emergency pills (morning after pills) is the distance from the health services. This factor is also impacted by economic circumstances in that it involves costs, such as transport and price of the contraceptives. Nkosi says:

> '…the fact that it's so small you have to go far to get condoms therefore if I'm stuck in a situation there like I have sex here I might have to deal with a situation whereby you know I get someone pregnant and then I'll be like in a situation where I can't really, I can't get like the morning after pills, or you cannot go to a clinic immediately because it's pretty far'.

Many studies have argued that the context in which young people live is an important influence on their sexual decisions. For example, the availability of family planning clinics has been associated with young people's improved uptake of contraceptives, particularly in the case of young women (Averett

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et al., 2002; Kavanaugh et al., 2011). Based on this argument, it would be expected that young migrant men, who had limited/no access to SRH contraceptives in their home regions as outlined above, were likely to access the easily available contraceptives in Johannesburg inner-city. However, it seems that while access is easier, there are still barriers, particularly in public hospitals and clinics. Tshepo described one of the major barriers reported by young men who participated in this study:

> 'The nurses in the hospital or clinic will look at you funny if you go there to get condoms as if you have committed a crime. Some of us, are very short and we do not have grown up faces so when you go you look young, so it's weird for them to give you condoms… sometimes it discourages you to get the condoms' (Tshepo)

Such disapproving and discouraging attitudes, as demonstrated by the health care providers, have also been reported in other contexts such as: (1) in rural areas of SA against young people's access to SRHR knowledge and resources such as condoms, (2) in cities, such as Johannesburg, especially against cross-border migrants' access to overall health care, and (3) globally, in cities such as those in China and other countries, again with migrants, both local and cross-border, being victims. Such attitudes by health care workers not only affect the migrants' health, but their position in the society, contrary to the aims of SDGs and other global structures, 'to not leave anyone behind'.

Our findings also suggested that few participants of this study, including Khaya, below, were fully aware of outlets that provided free access to condoms, such as public clinics and hospitals. They were aware of the availability of condoms and other contraceptives for purchase in retail outlets such as pharmacies, filling stations etc: '…there is a lot of places (condom outlets), yeah there is like a lot of private places, I am not sure about public places, but there are pharmacies, there's Dischem, Clicks like around us there is like 4/5 and doctors there's like 4/5 as well (Khaya).

PERCEPTIONS OF CONDOMS

Our findings showed that young migrant men had their own preferences regarding the condoms they used, who they used the condom with, choice of the condoms' access point and the reason for the use of the condoms. Many did not want to use the government's free condoms and expressed derogatory views about them. For example, Senzo said, '…there is nothing wrong with condoms at Joburg hospitals or clinics, but they are weird, and they are not exciting." Meanwhile Tendai expressed a similar view, '…I do not have a specific [type of condom], it just depends on what I can afford at that time…when I am brokeish I can use the Max, sometimes I have money I can go get some Durex…'

In 2004, the SA government launched, 'Choice,' a government branded condom (Polity, 2004). The Choice condom was reviewed over time, and owing to reviews by young people that its packaging was boring, the government rebranded it in 2016, added new flavors and relaunched it with a new name, 'Max' (UNFPA South Africa, 2016; Western Cape Government, 2016). This government programme's aim remains to reduce the spread of HIV among young people (Duby et al., 2021). However, the government's efforts, to this point, seem not to be sufficiently effective (see also Shrader et al., 2021). Young men, like Senzo and Tendai, the targeted users, are stIll disapproving of the packaging of the Max condom and of the methods of access – through public clinics and hospitals. Further improvement in the Max condom as a product is obviously still needed, and there is also a need for better marketing and distribution. Such actions may make the condoms better appreciated, and may attract more interested users.

While there were many reasons for using condoms, such as family planning, most of the young migrant men in our study said their main reason for first using condoms was their fear of acquiring STIs such as HIV. However, this did not necessarily involve continued use of condoms, as evidenced by Tanaka's statement, '…first time I used condoms because there is HIV… but the second time I didn't. We went for HIV tests and after we were found HIV negative, we stopped using condoms'.

This finding adds to the previous literature that reported that most migrant young men worried more about pregnancy than about acquiring HIV, when they engaged in sex without a condom (Manyaapelo, et al., 2019). Our findings indicate that, despite the issues of both HIV and pregnancy beign real, concern about them among young migrant men is over-ridden by their wish to discontinue using condoms. For example, as shown by Tanaka above, knowing that his sexual partner was HIV negative was enough reason for him to discontinue using condoms. Other participants also referred to trust of their sexual partner as being a reason for discontinuing condom use:

> I think it is the issue of trust and having to trust your partner because I trusted my partner and I knew that I am not up to bad things so, I wasn't cheating, and I was hoping that she was not cheating. I know, but yeah… (laughs) that is how I was thinking but I do know that safe sex is important (Jabulani).

Many participants expressed similar views to those above, that is choosing not to use condoms because they trusted their sexual partner or for some other such reason. However, it is noteworthy that, at the same time, the majority of them claimed that they knew that *'…safe sex was important,'* as commented by Jabulani. This indicates that most young migrant men had SRH knowledge and an understanding of the importance of protected sex.

Overall, our findings suggest that migrant young men understood the importance of using condoms, but that they held perceptions and views that conflicted with the practice of using them.

AVOIDANCE OF RESPONSIBILITY

We can conclude that that migrant young men in Johannesburg inner-city had access to condoms, understood their purpose and did make some efforts to use them. However, despite this, in many cases they did not use them. In making decisions not to use them, they usually blamed it on external factors such as that the inner-city area was too busy and that they were under too much

economic pressure: 'A lot is happening in Johannesburg... Joburg doesn't sleep you guys, like we talking about economic activities' (Bangi). A similar point was made by Senzo: 'Everyone is looking for survival. But Yah Joburg is, Joburg is tough, tough… the social life around Johannesburg is also busy'. These claims were presented as explanations/excuses for not taking sexual responsibility, while still engaging in risky sexual behaviours (RSBs) such as casual sex:

> It is just like sometimes you get someone you can vibe with like, some people are out there like you can just vibe (have sex with) for like six months, you vibing. There are no strings attached, it is just that one person that you are with, but it's not an intimate relationship (Tendai).

Many studies have categorized casual sex as RSBs (Choi et al., 2021; Renzaho et al., 2017), with its increased risk of STDs and HIV. Such studies show that this behaviour is common in Johannesburg, among young people, including among young migrant men. As can be seen from the above quotations, they did not take responsibility for this behaviour, but instead blamed their environment. It is interesting to use the lens of the person-in-environment theory consider (Dodd and Katz, 2020; Lawler, 2021). The theory views behaviours as being shaped by the environment but reciprocally, the person in that environment also contributes to this shaping (Deng and Yao, 2020; Green and McDermott, 2010). This framing may not be obvious for migrant young men who frequently feel excluded from their environment. However, it is useful to expose and enlighten them to the ways in which they may be contributing to shaping their environment, without even being aware of it.

Our findings also showed that young migrant men, in their refusal to take SRH responsibility, assumed that their sexual partners would do so:

> …there is this injection that they take, but also, we would condomise, but then it was not consistent. But then she was on…[kanje] by the way what is this thing called…

yeah, she was taking the injection from the clinic… I do not want to lie to you, first of all, I do not enjoy sex with a condom, hence sometimes I will be like no let us not use it because already you are taking the injection. So, yeah personally I do not like having sex with a condom (Jabulani).

In the above, Jabulani seemed to have no investment in understanding his own and his sexual partner's SRH practices. That is, he did not know the method of contraception that she used and seems to have made little effort to understand it. He also seemed to completely ignore the purpose of the condom, outside of the avoidance of pregnancy. He expressed no concern about acquiring an STI. This lends support to the view that some migrant young men do not take responsibility to practice SRH and, instead, see it as someone else's responsibility.

Another issue that arose was around the perception of female sexual freedom. Some young migrant men saw women in the Johannesburg inner-city as having a high level of sexual autonomy; being free to decide if they wanted to have sex with the young men who they may be with at that particular intimate space (Budu et al., 2021), Sipho describes how he saw it:

…when she feels it too it is not a matter of forcing her, it is a matter of are we feeling it… we don't plan it no, we start kissing and touching then yeah, looking at each other and imagining it… women, when you kiss and touch them here in Joburg they are likely to be the ones taking off your clothes and as a man, you are forced to make a move and continue… I also don't want to appear as weak; I mean she took my clothes off so why shouldn't I continue…?

However, this perception of the woman's sexual autonomy was again associated with lack of responsibility on the part of the man. Sipho went along with a situation where consent was not explicit, and with a presumption that responsibility for contraception and for SRH was somebody else's.

Conclusion

Our findings have shown that most young migrant men in the Johannesburg inner-city have access to condoms which they can get either get through public health services such as clinics or hospitals, or from a variety of different shops. However, despite easy availability, they do not always access condoms. Even where they do, their use of condoms may be reduced for a number of reasons, such as when they gain trust of their sexual partner, or when they and their sexual partner test HIV negative. Additionally, young migrant men may avoid taking responsibility for their own, and their sexual partner's SRH, practices. This again seems to be caused by a range of factors, chief among them being their location of Johannesburg inner-city. They see this as being a very demanding environment, creating high economic pressure which, in turn, leads them to engaging more in casual sex. This risky sexual behaviour (RSB) has been seen, in other studies, as an avoidance of long-term sexual relationship responsibilities. Our findings suggest that, despite their own perceptions, young migrant men seem to be in charge of their sexual decisions and behaviours, although the context also has some influence.

Our findings highlight that responses to the SRH needs of migrant young men must take account of contextual and individual level factors if these interventions are to yield positive outcomes. Social workers and ally professionals have a key role to play in this regard.

Observations and Recommendations

Efforts for UN 90-90-90 HIV testing, treatment and viral load suppression targets continue, and SAR remains part of the contributing regions in this regard. Arising from the study that informed this chapter, we make the following observations and recommendations to further improve health service development and delivery in the region:

1. Sexual decisions among young men, in general, remain a fundamental key point of focus in implementing efforts to reduce the spread of HIV in the SAR.

2. There is need for intervention to connect the micro and macro level factors at play for young migrant men to enhance sexual decision making that may yield favorable sexual health outcomes for them – and contribute to the reduction of the spread of HIV in the SAR.
3. Social workers and ally professionals have a fundamental role to play, because their intervention strategies are structured at three levels: micro, meso and macro. Using their variety of intervention skills, they can address:
   a. Micro and meso – act as sexual decision-making mediators in the immediate environment of young men to help reform their perceptions of the influence of the external and their own capacity for agency. Engaging with young men in smaller sessions around sexual health knowledge, enhancing their sexual behaviours and HIV campaigns.
   b. Macro – Contributing to structural interventions, which remain wanting e.g., there is a need for better marketing and improvements in the government free condoms to attract more young men to use them.

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14. FAMILY RECIPROCAL EXPECTATIONS AND YOUTH IRREGULAR MIGRATION IN NIGERIA

Casmir O. Odo & Ngozi E. Chukwu

Introduction

Family pressure on the youth is a key driver of irregular migration in Nigeria. This is compounded by reciprocal expectations in the family. International migration has an overwhelming impact on the elderly in the absence of formal social security in Nigeria. This chapter explores patterns of, and factors that influence, increasing irregular migration of Nigerian youths. It considers the effects of migration on families, with special emphasis on care of the elderly and examines the concept of reciprocity, as well as implications for social policy and social work practice in Nigeria.

Migration is an age-long phenomenon. Human migration is the most complex component of population change and is a complicated global issue. It is a human adjustment to economic, environmental and social problems and is difficult to project because of the uncertainties associated with the decision to change one's place of residence. It is an unavoidable feature of life for humans (Akanle, 2013; Akanle, 2018; International Organisation for Migration [IOM], 2014). From 2000 to 2013, there were around 232 million foreign migrants (3.2 percent of the world's population); around 30 million Africans have migrated internationally (World Bank, 2011). As socio-economic inequalities have deepened, cultural exchanges become more significant and globalization frameworks widened, the number of people migrating from one continent to another has increased (Akanle, 2012; Kirwin and Anderson, 2018). In most instances, the migrants' strong desire to enhance their wellbeing, regardless of distance and space, is a major factor in international migration. The origin, and continuation, of migration have been explained by inequalities, harsh socio-economic, socio-cultural, and political conditions in African countries (Ogu, 2017).

According to 'push-pull' theories, greater income opportunities in wealthier nations remain drivers for migrants

from low-income countries. Furthermore, the filial duty to provide care and assistance for parents and other family members remain motivations for youth migration. The New Economics of Labour Migration (NELM) sees the rationale behind international migration as a household collective decision-making for the wellbeing of the family as a whole (Stark and Bloom, 1985). Under this condition, after a successful initial migration by a family member, other family members will continue the flow of migration into new locations (Van Hear *et al.*, 2012). Usually, due to the existence of a migration network created by the migrant family member, there tends to be ease in accessing migration logistics such as facilitating visa application and securing jobs in destination countries.

Remittances made to the migrants' home countries also have significant impact on millions of households. The relationship between migration and impact on household has been viewed as an empirical question, with the answer depending on where and how it occurs. While some scholars believe that remittances maximize family income, status and risks (Taylor and Fletcher, 2003), others believe that migration does not always lead to a significant increase in wealth or a reduction in inequity in the country of origin (Adams, 2006).

African family members' success as migrants may affect a variety of household needs beyond that of just cash flow. These include economic development and education, family reciprocity, poverty reduction as well other filial responsibilities of households in the migrants' home countries. In Mali and Senegal, migrants are primarily from rich families, whose monetary gains come primarily from the family member who migrated. Families in Burkina Faso and Ghana that get monetary compensation from migrants are more likely to construct and own better, longer-lasting concrete structures (Mohapatra, Joseph, and Ratha, 2009). During times of food shortage, households in Ethiopia that receive financial help from migrants were less inclined to sell productive assets such as livestock and land (Mohapatra, Joseph, and Ratha, 2009). In 2010, and 2013, Nigeria received an estimated $10 billion and $21 billion respectively in aid (World Bank, 2013). While these are very substantial sums, it is noteworthy that

remittances accounted for 41.5 percent of official development assistance (ODA), 6.7 percent of Gross domestic product (GDP), and 4.4 percent of foreign direct investment (FDI) in 2015 (World Bank, 2015). However, as well as a major economic contributor, the level of resources sent home by successful migrants has equally been identified as a key factor fuelling the surge in youth irregular migration in Nigeria, and across Africa. Female migrants are under pressure from their parents, particularly in rural areas of Benin City, Edo State and other states in Nigeria to migrate irregularly to satisfy family needs (Ogbuze, 2019).

Migration is viewed as a family endeavor in certain Nigerian communities, with family members contributing their physical, spiritual, and financial resources to guarantee that their relatives make the trip to Europe. Many families sell their property and take out loans to ensure that they mobilize the financial resources to assist their children on their journey to Europe. The hope is that the returns they get will compensate for the difficulties they might experience as a result of these decisions (Effevottu, 2021). Unfortunately, the outcomes of these journeys are not always favourable as some of the young migrants fall victim to irregular migration syndicates and scam networks and often land in jails overseas for migration-related offences.

Patterns of International migration

Migrants are heavily reliant on the deliberate choices and goodwill of their families (Fleischer, 2006). Kinship in Nigeria has a significant influence on an individual's choices and decisions. As a rule, it is the migrant's family or friends that initiate or encourage their departure from the country (Akanle and Olutayo, 2011; Akanle, 2013). When it comes to understanding the intersections of family, international migration, and social capital in low-middle-income (LMI) countries, Nigeria is an excellent case study. It is no secret that Sub-Saharan Africa's international migration centres are located in Nigeria. Many Nigerians left the country during the economic crisis of the 1980s in pursuit of better employment prospects overseas. This was in order to sustain their personal, familial, kinship, and national economies which were struggling (Adepoju, 2010). When a member of one's family

migrates, it increases the possibilities of additional family members doing the same, as well as widening life chances and extending the revolving deployment of social capital in general.

As noted by Fleischer (2006) people migrate not only for personal gain, but in order to provide social capital benefits to their immediate and extended family members in their place of origin. Social and cultural ties among Nigerians are also quite close and as a result, kinship and social networks allow them to stay in touch with family members. To indicate their continued connection to their relatives in the place of origin, members of kin groups who emigrate send remittances back home (Akanle and Adesina, 2017). These remittances help to improve the living conditions of the family.

Concept of reciprocity and care of older people
Reciprocity refers to mutual exchange between persons that benefit both parties. A reciprocal transaction between individuals is the cornerstone for reciprocity; each individual anticipates that a societal obligation would be reciprocated (Gouldner, 1960). More specifically, reciprocity refers to a process of exchanging, as well as the level of balance in interpersonal social interactions (Fyrand, 2010). In other words, older people provide care to their children with the expectation of receiving something in return. However, some parents are unsure if their children will return the kind gesture (Becker *et al.*, 2003).

In Nigeria, there is no formal social security for older adults; hence they rely on their children, the extended family, community members and friends for social support (Oladeji, 2011). This lack of social security in Sub-Saharan Africa forces families to provide informal care for older people, and young people above the age of 18 are often the ones who offer the most of this informal social assistance (Okoye, 2013; Okoye, 2012). Older people in Nigeria benefit from a wide range of care and support services, comprising psychological, economic, and religious support with daily living tasks. Access to these supports were associated with higher psychological well-being in older persons (Oladeji, 2011). It therefore has both spiritual and normative meanings that adult children provide care and

assistance to their elderly parents as a means of paying back. According to their religious beliefs, adult children think that taking care of their elderly parents draws good fortune and that their children will do the same for them in later life.

As a result of the poor economic conditions fuelling youth migration and unemployment, elder parents' informal care and assistance in Nigeria has become challenging (Ajomale, 2007). Likewise, Nigeria's constantly changing social structure has put the concept of reciprocity, in relation to family care for the elderly, in jeopardy. Adult children in many Nigerian households have abandoned their elderly parents in rural areas, believing that their parents failed to train and support them while they were young and so do not deserve any help.

About 4.3 percent of Nigeria's population is above the age of 60 and by 2050, around 6.3 percent of all individuals will be 65 or older (Help Age, 2019). The rise in population of the elderly is attributable, in part, to considerable advances in the general standard of living as well as in medicine and healthcare delivery. This shows that the number of older adults to be supported and cared for will continue to grow significantly (Okoye, 2012). Currently in Nigeria, it is only the states Osun and Ekiti that have implemented formal care for the elderly. People aged 65 and above in Ekiti and Osun are eligible for financial assistance under this program (Help Age, 2019). However, as previously stated, in Nigeria more generally, there is no social security for older people and family support is dwindling. Further to this are the structural changes within Nigeria as a result of urbanisation, industrialisation, and migration, as well as the ever-increasing western influence in African society (Oluwabamide 2005). All these factors combine to affect the well-being of the elderly, leaving them at greater risk of poverty and isolation (Adebowale, Atter and Ayeni, 2012),

Factors affecting surge in international migration

SOCIO-POLITICAL AND ECONOMIC REALITIES

There has been an increase in the number of Nigerians who are leaving the country without any desire to return, occasioned by unemployment, job displeasure and financial difficulties, combined with excessive inflation and corruption (Akanle, 2018). The corruption perception index published by Transparency International (2018) rated Nigeria 148th out of 180 nations. The UN attributes the cause of increasing international migration of Nigerians to a large range of factors: poverty; mortality rates; ethnic/religious random killings; terrorism; low human development index; money theft; maltreatment of Internally Displaced Persons (IDP) (UN 2018). Many Nigerians have lost hope of realizing their full potential as the Nigerian system is riddled with favoritism and nepotism. In certain communities, it is believed that relatives who emigrated earlier are doing well, or at least appearing to do well (Togunde and Osagie, 2009). Emigration is therefore eagerly pursued even though the potential immigrant has no clue about what prospects Europe and America might hold.

In Nigeria, terrorists and kidnappers are abducting schoolchildren and other individuals, which is increasing people's anxiety about living in the nation (Ross, 2018). Often, the issues that are brought to light legitimize human trafficking and illegal migration and make it harder to safeguard the displaced. Alongside the factors outlined above, voodoo practice, material culture, ignorance, weak value system, and lack of social protection are are further notable elements that influence the desire to migrate internationally (Okoye, 2013). Human trafficking and illegal migration for sexual exploitation, for example, are reinforced by voodoo practices, as girls are terrified of being murdered if they reveal their traffickers' names (Baarda, 2016). The World Health Organisation has also observed that disorganized child-fostering techniques, particularly of girls, can lead to lack of quality education and increased vulnerability to human trafficking and irregular migration (WHO, 2011). Nigeria has been rated as one of the top nine central departure

countries for irregular migrants in Africa (European Migration Network (EMN), 2018) which has given rise to voluntary and forced deportations of Nigerian nationals. In 2017 alone, more than 100,000 Nigerians were deported from Europe and other countries (The International Centre for Investigative Reporting, 2017).

IRREGULAR MIGRATION AS SURVIVAL STRATEGY

Irregular migration refers to the movement of individuals to a different country of residence, or transit, that occurs beyond the regulatory requirements of the originating, transiting, and destination nation (IOM, 2011). Despite the hazards, irregular migration from Africa to Europe has been steadily increasing over recent years (Laine, 2020). In this context, there is an increase in Nigerian irregular migrants who are willing to pay agents to facilitate their travel to Europe in order to ensure 'a good life'. Fantastic stories told by peers/relatives who have migrated to Europe and the exhibition of wealth when they visit home are attractive to potential migrants.

Nigerian irregular migrants make up most of the influx of migrants to Europe and North America, compared to other nations in sub-Saharan Africa, accounting for about 25.5 percent of all West African migrants in developed nations (De Haas, 2008). The Nigerian youths who flee the country in search of a better life, are attracted by dubious and misleading information regarding work opportunities in the countries of destination and without a grasp of the labour rules in those nations. Most migrants end up working in dirty, humiliating, and hazardous professions in order to survive in their destination countries (Adepoju, 2003).

More so, Benin for instance which is known as "the corridor to Europe" (IOM, 2019), rural and increasingly urban parents put a lot of pressure on their daughters to move irregularly in order to satisfy their family's financial and social demands (Ogbuze, 2019). As NELM suggests, the decision to migrate is jointly made by the family. This often means that family members make joint contributions and sometimes sell landed property or take up

loans to finance the journey in the hope that remittances they get would make up for their sacrifices.

International Migration and care of older people

In Nigeria, many older adults are separated from their adult children, who they rely on for sustenance, due to international migration. Most of the elderly in the country are rural inhabitants and do not have access to pension benefits when they reach 'retirement age' and thus must depend on their own earnings or the assistance of family members, especially their children. As adolescents and adult children migrate, rural regions' standards of living are expected to decline.

In general, there is little or no formal care for the elderly in Africa, and that given by family members is diminishing owing to circumstances such as migration, youth joblessness, economic hardships, and so on. Nursing facilities and community care services for the elderly are likewise almost non-existent and, where they do exist, they are underfunded. The elderly do not receive their pension on time, or at all; it has a very restricted scope and is insufficiently funded (Ajiboye, 2011).

Caring for and supporting the elderly is frequently characterized in terms of physical location, material (providing money or products) or time-based help. This characterisation is closely connected to traditional African society's family-based model of elderly care. The effectiveness of this caregiving structure is now being undermined by the high incidence of migration, which is having a substantial socioeconomic impact on the provision of family care to aging parents (Kinsella, 2001).

The huge emigration of young people from Nigeria, exacerbates age-structure discrepancies: eliminating young people at a time when the elderly population is rising. Loss of familial connections, caused by the increased international migration, leads to a rise in solitary living among the elderly and a decline in an indispensable component of support and care for them (Apt 2000). As already discussed, migration increases children's economic power, and consequently economic assistance to parents. Remittances can then be utilized to provide domestic help and associated support (Antman, 2012). However

further research is needed to ascertain the quality of care provided to elderly parents through these sources. This situation has policy implications requiring social work perspectives.

Social work and international migration

Migration is a global phenomenon that needs to be addressed by social workers in a much more intensive manner. Social work research, responses and teaching in the shifting patterns and implications of migration have received very little attention (Lyons and Huegler, 2012). This is unexpected, considering the fact that this is a central issue of our globalised society, and one that has been increasingly addressed in social work literature (Lyons, 2006). The social work profession is centered on combating various types of injustices and social situations that obstruct people's well-being and goal ambitions (O'Brien, 2010). Social work professionals have a very important role to play in the field of migration, not least through the provision of counselling and advocacy services (Turtiainem, 2018; Cox and Geisen, 2014). Sadly, social work has not received professional recognition in Nigeria.

While migration could be an empowering experience, many migrants endure human rights violations, abuse and discrimination. Thus, there is a need for well-trained social workers who are committed to promoting a discourse on human rights and acceptance, and to preventing discrimination, oppression and racism. As noted by Nicotera (2019), social work is primarily responsible for promoting social justice and equality, especially in the face of growing regular and irregular international migrations. Issues around irregular migration cannot be discussed effectively without cognizance of the injustices, human right abuses, social exclusion and the unfair distribution of resources embedded in the economies of different nations. Justice is the fulfillment of an individual's, group's, or community's rights and entitlements based on the concepts of equality, equity, access, and inclusion in the face of resources and opportunity (International Federation of Social Workers [IFSW], 2014). This is consistent with much social work research on anti-oppressive approaches of social work (Dominelli, 2002).

The anti-oppressive approach aims to identify and address the structural roots of social justice issues and their repercussions. It aims to make social connections productive at the micro, mezzo, and macro levels or at the personal, cultural, and structural levels. It aims to reduce the detrimental and negative consequences of structural inequities and power structures on human livelihoods (Anderson, 2010). Without doubt, irregular youth migration in Nigeria is the result of the harsh economic realities of the lives of the young people and their families. Therefore, engaging social workers to be at the forefront of campaigns against irregular migration and educating people on appropriate and legal ways to migrate as well as exploring viable economic options for the vulnerable is timely and imperative.

The challenges of providing care and support for the left-behind older people occasioned by youth migration underscore the need for gerontological social work in Nigeria. Here social workers would engage in assessment of economic, mental health, social, psychological and spiritual needs of these left-behind older people (George, 2012; Okoye 2013; Okoye, 2012). An in-depth knowledge of these needs would assist in developing functional home and community-based care and support programmes for older people. It could also provide social workers with the skills to make interventions, when necessary, in areas such as arranging alternative care support, assessing and meeting accommodation needs as well as securing protective guardianships for vulnerable older people

Finally, social workers have an important role to play in public awareness campaigns, studies, information management, mediation, and policy development in relation to migration. These are key areas of work where social work input could make a substantial contribution to information provision and to proviing safeguards to protect young migrants from abuse and exploitation. Social workers need to promote community education through town hall meetings, churches, and markets to address issues such as trafficking deceptions, religious deceptions, and hostile cultural practices, among others.

Conclusion/Policy recommendations

This chapter has explored increasing irregular migration of Nigerian youths, occasioned by socio-economic realities and reciprocal expectations, especially care of older people. It has also looked at the implications of this for social work practice. Irregular migration was found to be a survival strategy for the youth. However, apart from the intrinsic risks of it, it also has an overwhelming impact on the elderly in the absence of formal social security in Nigeria. This is because adult children and youth who are expected to provide care and support to older people are unavailable to do this due to migration.

To this end, the Nigerian government should implement the National Policy on Migration 2015 which proposed the provision of targeted information to youths on illegal migration, combined with the promotion of job and self-employment opportunities (IOM, 2015). It is also important that non-governmental organisations and other members of the civil society work together to combat irregular migration, particularly in irregular migration prone states, such as Edo.

Social workers are ethically bound to challenge unjust policies and social conditions that contribute to inequality, exclusion, and discrimination (Nwanna and Oluwu, 2017). They are required to fight for favorable economic policies and laws that would enhance people's living situations, as well as to educate the public about the dangers of irregular migration through awareness campaigns on social media and communication channels in collaboration with other relevant agencies. This awareness raising should begin with the family unit, because strong family support plays a key role in the growth of irregular migration.

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15. A Broadening Horizon: Intervention in the Field of Migration as a Path Towards Internationalization for Italian Social Work.

Roberta T. Di Rosa

Introduction

Due to a significant increase in migration flows to Italy over the last four decades, professional social work in Italy has been confronted with the 'internationalization of social problems' (Dominelli 2010) over these forty years. This fast and prolific process of immigration has forced institutions to deal with issues for which our society, policies, and service system, have not been properly prepared. This highlights the need to provide updated training to social workers regarding the 'trans-cultural approach', to facilitate understanding of the meanings and the cultural models and the processes of care and assistance. Despite a substantial and well-established commitment in the area of reception and integration of migrants, the social work remains characterized by a certain 'localism' - i.e., anchorage to a certain delimited territorial context. Breaking away from the local sphere as the one and only sphere of intervention, and encouraging an international practice aimed at stimulating cooperation and the dissemination of respect for human rights, seems to be an experience still reserved for those professionals who are not part of the territorial/local services, this being an enterprising and pioneering choice aimed at experimenting with new practices. Moreover, analysis of national literature on the subject shows that little interest is devoted to the phenomenon of internationalization of social work and the study of this field of intervention in Italy. There are not many professionals in the Italian context engaged in projects and interventions that go beyond national frontiers. There is no theorising on this phenomenon, and, in many academic circles, there is a total disregard for the subject.

In this chapter we will describe the main stages of the growth of Italian social work, tracing the origins of its contemporary characteristics. Subsequently, we will deal with social work in the

specific field of migration. This is the sector in which Italian social work is facing the challenge of an intervention that takes it out of the local dimension of services, and the actual person or local communities, and projects it towards methodological, ethical, and political challenges of a global dimension.

Social work in Italy: a profession still in the process of social recognition

The emergence and growth of the professional figure of the social worker in Italy dates back to the mid twentieth century, to the years 1946-48 after the Second World War, where they had a role in tackling a situation of widespread social and national economic degradation. As a significant presence, social work became a reality when the concept of social assistance witnessed a more concrete legislative application, through the affirmation of the Social State, the type of State that aims to guarantee, not only equality and freedom to its citizens, but also, what is known as, 'social well-being' (Gui 2004; Mordeglia 2005; Fargion 2009). In the initial stages of Italian welfare, in the 1950s and 1960s, social work was present, to a limited extent, in the municipalities or Provinces (to provide aid for illegitimate minors, mentally ill, blind, deaf-mutes, those unfit for work, etc.) and in other local bodies of a public nature.

Hand in hand with the insertion of the profession into the public welfare system, a career training path developed, envisaging various levels of recognition and institutionalization. From the 1950s to the mid-1960s, training was carried out mainly by private social work schools, religious and non-religious, and by six schools (oriented towards special goals) established in an equal number of state universities. Social work was strongly represented in national bodies, which then provided most services. Since the 1970s social workers have been identified almost wholly as 'internal' workers within public bodies (Di Rosa et al. 2019), upholders of the Welfare State mandate, increasingly homogeneous as regards professional identity and profile, 'with polyvalent characteristics' in the albeit cohesive methodology of the helping-process (Bianchi et al 1993: 36-37). In the course of the subsequent decades, in spite of provision for this professional

profile being laid down in many laws in the sector, the profession operated without any juridical recognition, with what were principally private training courses. There were only a few academic centres recognized as 'schools oriented towards special goals', capable of responding to the job-oriented training peculiarities (i.e. academic internship).

It was only with the reform in university qualifications in the 1990s (with the definitive inclusion of social work training) that parity with other training courses in other professions was finally achieved. Alongside this, absolute dignity of social work as a profession was achieved by the institution of a professional order in 1993. Over the last thirty years, sanitary and social reforms (DLGS 229/1999, National health plan 1998-2000) have significantly involved the figure of the social worker, confirming the standing of the profession, with its institutional mandate closely linked to the evolution of public policies. From then the social worker obtained full juridical recognition for their training courses and professional careers.

Law 328/2000 set out the definitive recognition of the centrality of the profession within the Welfare State. Since then, the profession has progressively branched out internally, and alongside the 'generalized' figure of the social worker, other professional figures have appeared, with specific aid duties, due to an emerging demand for greater specialization (Folgheraiter & Bortoli 2004). Additionally, the process of strengthening of third sector organisations favoured the fragmentation of skills and the proliferation of new professional social figures, with increasingly specific and sectorial functions (Tousjin & Dellavalle 2017; Di Rosa et al, 2019). However, the critical issues deriving from the long road travelled have not all been resolved: 'Since the end of the 1980s social work education has only been carried out in universities; in 2012 there were 38 universities offering 45 social work bachelor courses. Moreover, social work master programs can be found in 36 universities across the country. The current economic crisis (the most serious since the Second World War) is heavily affecting the system of social services (…). Social work education must find new ways to train professionals and enable

them to embody the values required in this field of work' (Sicora 2015: 46).

Contemporary social work has suffered from the changes taking place in Italian society, involved in the global dynamics that Castel (2004) defines as a process of '*collective de-collectivization*'. The excessive exaltation of liberty and individual well-being has gradually eroded the ideological bases of a universal type of welfare. The welfare system seems to be oriented towards providing individualistic responses to satisfy the desire for well-being, with counter-productive results on many fronts (Gui 2017). The social services system has found itself having to face both the delegitimizing crisis and the shortage of available resources and responses. This, as well as the risk of de-professionalization, inherent in social work distanced from the planning aspects and confined, almost exclusively, to the handling of individual cases. Welfare is becoming more and more delegitimized, with the values of social inclusion and equality being undermined. This ends in manipulation by political organs and the mass-media, instilling in the general public indifference and hostility towards the Welfare system, deemed responsible for the present public deficit. The change is not only limited to the altered working conditions, to which social workers have had to adapt; above all, the fundamental principles that once constituted welfare, and that are now more and more uncertain, also need to be examined (Nothdufter 2011).

The economic crisis in which we have found ourselves for some years now has also brought with it drastic cuts in public spending: the type of charitable, rather than promotional, Welfare, oriented more to containing expenditure than to well-being (Fazzi 2010). The liberalization of public assets, governance, the rhetoric of monetarisation (e.g. the introduction of vouchers), the managerial implementation of the social services, the erosion of universal rights and the contractual arrangements of social policy are some of the on-going transformations that involve the Italian Welfare system.

In this context, the paradox of a profession dedicated to the protection of social rights is fulfilled, but it often fails to guarantee for itself the right to a protective and protecting professional

practice (Mordeglia 2018). On the one hand, social work placement in the Public Administration provides more pronounced paths for the profession, more suited for skills and functions than previously. On the other hand, social workers are undergoing a process of 'precarization', in the public, as well as the private, sector; recent financial laws have restricted recruitment, so that professionals in public and private social services are more and more often contracted as free-lance or non-permanent personnel.

Lights and shadows in Social work praxis in the Italian reception system

With growing global economic inequality, wars and conflicts, Italy became a destination for immigration in the late 1980s, becoming over the past four decades a major gateway for migration from the global south to Europe (Parusel 2017). In the 1990s, the first waves of foreign migrants arrived in Italy, with flows of people directed towards the eastern coast of Italy from Albania, as a result of the situation of considerable instability in that country during the transitional phase, following the collapse of the communist regime. Since the 1990s, with the succession of human emergencies that have had direct repercussions for Italy in terms of arrivals, and, above all, pressure from the European Union, the Italian state has adopted a system of norms aiming to regulate the number of foreigners and their movement around Italy (Zincone 2011).

Social Work has played a key role in the reception system of immigrants in Italy (Di Rosa et al. 2021). Ever since the first rescue operations, social workers have represented the interface of the Italian reception system, meeting migrants face to face, welcoming them and learning their personal histories. Nevertheless, in the daily practice of social workers, there are marked variations in the professional skills involved, and in the consistency and effectiveness of interventions, often needed to remedy the deficiencies or lack of realistic policies for immigrants (Di Rosa 2017b). Faced with the growing demand arising from migration, the professional community has been called to reassess both the training of social workers and the updating of

methodology and functions, especially regarding access to services and the availability of rights, as well as in the adaptation of services tackling immigrant needs.

The field of migrants' reception is the one that most clearly shows the consequences of the Welfare crisis described above, consequences that can be observed both at the level of negative public opinion towards services addressed to migrants, and at the level of organisation of services that are always more focused on emergency reception than on the long-term. The current approach, focused on security rather than integration, makes job offers for social workers, along with the economic and organisational conditions of the job itself, extremely variable. This job insecurity characterises, in particular, social workers who work in the migration sector, an area that continues to rely on emergency management and is run in Italy through the third sector, which deals with reception activities for migrants on the basis of ministerial or local authority calls on European funds.

There are critical areas in the welcoming system: first of all the quality of accomodation and services provided; migrants and asylum seekers are frequently hosted in crumbling structures, physically and geographically isolated, and far from city centres, social services, etc. The discomfort experienced by the migrants living there creates ideal conditions for violent outbursts, self-harm, and aggression among the migrants themselves and towards the operators, who are exposed to high–level stress and potential burn-out. Another critical situation common to all (migrants, unaccompanied minors, trafficking victims, and refugees with recognized status) is discharge from the hosting programmes. Once they are out of the centres, they remain in a condition of neediness that requires intervention by ordinary social services, but which, more often than not, corresponds to their disappearance into the world of clandestine survival. Today, there are certainly particularly complex, needy, and vulnerable subjects, such as those needing psychiatric assistance, especially those from language/cultural groups that are remote from the Western model of treatment of mental health. Overall, however, most of the applications for social assistance from the foreign population are rather similar to applications from ordinary local

Italian applicants, with regard to features and type of response received (Marzo 2017).

A more adequate response to the complexity of the needs presented by migrants leaving the reception system should be sought in a balance between inclusion in the area of 'ordinary' services (as for the majority of the population) and the development or maintenance of services aimed at a specific migrant group, able to take into account the multiple sources of vulnerability typical of the migrant condition (work, housing, social and relational integration) (Barberis & Boccagni 2017).

In addition to the structural problems, there are several other critical aspects linked to the training and motivation of professionals: the conditions of precariousness and low pay, and the excessive workload have a negative impact on the motivation and quality of the services provided. Often young, in the first years of professional experience, the social workers have not had specific training in cultural sensitivity and find themselves working in structures or services that suffer from a hazardous lack of provision of resources. Because of the pressure of social policies, these social workers experience the tough challenge of reconciling the professional and institutional mandates (Di Rosa 2017a). They must also take account of feedback from operators dealing directly with migrants and balance up the discretionary power inherent in a system 'in progress', where procedures are continually being adapted to subjects' needs. What this means, on organisational and methodological levels, is a relatively high degree of discretionary power in the hands of social operators, who then often assume the guise of 'implicit, political decision-makers', in a conscious and intentional manner (Ambrosini 2013). From the point of view of these operators, discretionary power may be experienced as an area where one might apply one's professional autonomy, but also as a space of uncertainty and 'groping' for adjustments. This reflects the uncertainties and difficulties undergone by the immigrant clients themselves and might also be a source of tension and frustration for the actual operators.

The greatest risk for social work is that of becoming a social control agent (Polakow-Suransky 2017), providing a precise set of

activities aimed at standardizing the conduct of individuals, while respecting the group's standards and expectations. It presents a continual challenge to the political potential of the professional attitudes of social workers, though this cannot be grasped by all professionals. Nor can professionals necessarily count on the supportive action of the professional community. According to Facchini (2010) the profession was still linked to old operational tools, maintaining original values that were not always able to understand and cope with increasing uncertainties. There was no real awareness of what was happening; social workers still seemed to be tied to outdated orientations and lacking instruments to interpret the connections between the contingent situation and the macro-context.

It is not easy, in these working situations, to adhere to the political dimension of intervention, nor is it so easy to realise the potential of the profession as described by Williams & Graham: 'as a profession, we are well positioned to meaningfully identify the nature of needs, shape discourses of settlement and integration, develop models of practice and contribute to policy development' (2006: i5-i6). If the professional social work mandate is universalistic and anti-discriminatory, the social work mandate as an expression of the welfare state is not necessarily so. Moreover, discretional responses to precise needs, not envisaged by the law or immovably set, can lead to the resolution of specific local problems, but can also lead to increasing inequality between local areas and the various relevant beneficiaries (Barberis 2010).

Social work as an antidote to the limits of Welfare?
The effectiveness of the migrants' paths to integration and autonomy is closely linked to the linking-work carried out by the social workers in three directions: 'the institutional network (police head-quarters, prefecture, school, health services, employment agencies, job centres); civil society (the third sector, associations, the local area, residents); and any ethnic communities already settled there' (Art. 33 of the Deontological Code of Italian Social Workers: 2009, translated by author). In order to fully exercise a 'critical and reflective professional

practice, consistent with its fundamental values rooted in the promotion of human rights and social justice' (Dominelli 2005) the social work community had to develop:

> … a clearer understanding of where and to what extent trained social workers are contributing to programs within the migration sector, whether in terms of policy advocacy, community organizing, or direct practice as service providers working with immigrants and refugees. Developing new approaches to grappling with ethical dilemmas when participating in the implementation of unjust policies; pioneering responsive methods for social workers to engage in dialogue with varied stakeholders to address xenophobia, nationalism, restrictive migration policies; and promoting innovative practices for the integration of asylum seekers and refugees are all vitally needed (Popescu and Libal 2018: viii).

Social work as a profession – in education and practice – has an important (if largely unfulfilled) (Popescu M. and Libal K., 2018) role to play in advancing the human rights of migrants and refugees. For this reason, terms such as immigration, migration and refugee should become central to the development of the social work discipline, as well as participation in social policies (Campanini 2009). Italian literature only partially informs about international and domestic social work practice regarding the social environment aspects of international migration. Research dedicated to the topic reveals the persistence of limitations on social work practitioners to effectively engage in culturally appropriate practices with migrating populations - both domestically and internationally (Spinelli & Accorinti, 2019; Di Rosa, 2015; Barberis & Boccagni 2017; Pattaro & Nigris, 2018; Segatto et al, 2018; Peris Cancio, 2019). In order to address these challenges, social work needs a strong (new) professional identity and an increased focus on training and possibilities of internship for social workers internationally, in order to develop an adequate level of professional standing: 'within these multiple

contexts and paths of migration … with specific implications for social work practice (Shier, 2011: 52).

The power of international connections

In Italy, training and further education are currently focusing on the development of intercultural professional skills to re-direct interventions in the migration field, by investing in competencies and responsibilities (Blunt, 2007; Shier et al, 2011; Di Rosa, 2017a; Cohen-Emerique, 2017). There remains to be developed, in particular, 'the integration of exemplars and approaches to social work practice regarding migration as an issue in advancing social justice and human rights' (Popescu M. & Libal K., 2018: x). This line of professional development could well benefit from connection and exchange with the international community (Raya & Lopez Pelaez, 2017). Today, on the international scene, there is fervent activity on the part of international organisations and associations (International Council of Social Welfare (ICSW); International Association of Schools of Social Work (IASSW); International Federation of Social Workers (IFSW)) that are making the dream of a truly international social work, a globalized and globalizing social work, a reality. It is this dimension of international community-belonging that is not yet part of the common heritage of Italian social workers. This lack of contact distances Italian social workers from awareness of the impact of international phenomena on their daily work. It is therefore necessary to make a leap from the micro to the macro, from the local to the global, from a limited territory to the large network of international relations.

In the *Global Definition of Social Work*, it is affirmed that, among the basic mandates of social work, there is also the liberation of the person. Therefore, the implementation of social work interventions capable of respecting human rights necessitates responsibility of a collective type, or the capacity to create 'relationships of reciprocity within the communities'. Yet people are not liberated by acknowledging them abstractly, but by working in concrete situations (Banks & Nøhr 2012). Globalization, migration, and diversity need to become mainstream concepts in contemporary social work (Cheetham,

1972; Ewalt, Freeman, Kirk, & Poole, 1996; Lyons, 2006), with a strong investment in defining the shared standards necessary for the development of professional mobility, via the funding of international research and training programmes aimed at strengthening 'common values, knowledge, and skills' (Harris, 1997: 429).

Only a professional contribution can characterize services to, and with, people, to regenerate, and empower social work to attain a fundamental re-orientation in the ways of understanding and shaping caring relationships and fostering a humane promotion. This in a process of influencing and orienting social policies towards the establishment of principles of equality and social cohesion.

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16. Oppression or Liberation? The Function of Social Work in Migration Management

Tanja Kleibl and Nikos Xypolytas

Introduction

Antonio Gramsci (1971), one of the most frequently referenced political theorists and cultural critics of the twentieth century, starts his Prison Notebooks by profoundly questioning the historical formation of the intellectual, associated with the modern Western university, as it emerged about 400 years ago. In his notebooks, Gramsci asks an important question, which we have chosen as an orientation for this chapter: are intellectuals an autonomous and independent social group, or does every social group have its own particular, specialised category of intellectuals? We aim to apply this question to practitioners and educators in the field of social work, to analyse the specific functions that social workers fulfil in the current divisive system of migration management. The analysis will be undertaken from a range of perspectives - social, historical, post-colonial and political economy. The objective of this process is to consider the critical need for re-orientation of the social work profession to which is more in line with the teaching of Paolo Freire and Ignacio Maritín-Baró on liberating social action centring on the notion of praxis, reflection on action for transformation (Mayo 2020)

The role and function of the intellectual, hegemony and the 'Southern Question'

'All men are potentially intellectuals in the sense of having an intellect and using it, but not all are intellectuals by social function' (Gramsci 1971, p. 1) For Gramsci, the role of the 'new' intellectual – a role he certainly adopted and took very seriously during his lifetime - is to create consciousness for a social group, that can bring meaning and understanding to one's position in society, and their role in life. Once this consciousness has been built, the role may be compared with the function of a 'glue' that bonds social and political forces in an alliance against oppression for positive change. Type of education, cultural influences and

geographic positionality are all influential factors in people's lives, embedded in their 'common sense', and informing their worldviews and practices which, in turn, are influenced by various types of intellectuals. In this chapter, we combine Gramsci's category of the 'intellectual' with his analysis of the 'Southern Question' in a move towards liberation theory and the social action approaches of Paulo Freire and Ignacio Martín-Baró. Their transformative thoughts will guide our arguments for an urgent need to re-orientate Social Work towards political empowerment, with a specific focus on refugees and migrants.

Capuzzo and Mezzadra (2012) underline the contemporary relevance of Gramsci's thoughts for understanding uneven global development, based on his conceptualization of the 'Southern Question'. Referring to Edward Said's (1979) work, the authors claim that in particular the importance Gramsci attaches to 'space' opens up the 'possibility of using his concepts in order to reconstruct historical and contemporary dynamics of global capitalism in its multi-scalar hierarchies, relations, and conflicts' (Capuzzo & Mezzadra 2012, p. 48). Gramsci's international analysis and perspective about the worsening 'hierarchy of exploitation' (Young 2012, p. 19) in the context of global capitalism, puts further emphasis on critical global power dynamics. This analysis provides a useful approximation to the understanding of the divisive relationship between former European colonizing states and their dominant social groups, and migrants and refugees[50] moving from former colonized regions towards Europe.

Considering the roles of the intellectuals in migration management within the context of the colonial power matrix (Quijano 2000), will allow us to take Gramsci's transformative

[50] The terms migrant and refugee will be interchangeably used in this paper, as the distinction between the two becomes increasingly arbitrary in the present context (Turton 2003, Crawley and Skleparis 2018). Furthermore, it represents a categorical classification that supports the institutional interests of European political and economic elites and not the lived experiences of people on the move in the 21st century.

thoughts and apply them analytically at a lower more concrete level. The level in question is that of the flawed Western Migration Management system, and its associated 'helping system', in which Social Work operates within a dialectic of care and control (Lavalette 2020). Gramsci (1971, p. 1) sees the world as being composed of various 'capitalist entrepreneurs' that are organized around their disciplines, e.g., Political Analysts, Organisers of New Cultures and, of course, Social Workers. For him it was the type of leadership, as well as technical and intellectual capacity, which distinguished 'traditional' from 'organic' intellectuals. This differentiation was crucial to his analysis of the influence of the elitist educational system, the role of intellectuals within it, the position of culture, as well as his understanding of the production of 'common sense', hegemony, and the role of political and civil society therein. Hegemony, a central term in Gramsci's conception of civil society, is best described using his own words:

> What we can do, for the moment, is to fix two major superstructural 'levels': the one that can be called 'civil society', that is the ensemble of organisms commonly called 'private' and that of 'political society' or 'the State'. These two levels correspond on the one hand to the function of 'hegemony', which the dominant groups exercise throughout society and, on the other hand to that of 'direct domination' or command exercised through the State and 'Juridical' government. The functions in question are precisely organisational and connective. The intellectuals are the dominant group's 'deputies' exercising the subaltern functions of social hegemony and political government (1971, p 12).

Gramsci's attention to geographic and historical positionality gave rise to a new understanding of hegemony associated with his refreshed interpretation of 'philosophy of praxis' (in both space and time). From a Gramscian perspective, intellectuals are not only interpreting social movements from a neutral position, but they are themselves organic elements of the formation of

hegemony (Apitzsch 2016). This is something which lies at the heart of our argument. Whilst the organic intellectuals are the organisers of masses (and social groups or movements), traditional intellectuals (e.g., scholars, artists, clerics) have a specific association with the mode of production. This originates from the feudal mode of production, where they have been integrated, and where they re-function according to the new practices and needs of the capitalist system (Gramsci 1971, pp. 10-11). With expanding capitalism, Gramsci problematized the increasing co-optation of organic intellectuals into the hegemonic system of capitalist production, where they began to function as 'confidence builders' (Gramsci 1971, pp. 5-6). This co-optation distances intellectuals from the masses (see also Apitzsch 2016, p. 30) and any questioning of the powerful establishment.

From a subaltern perspective, a position from which Gramsci wrote, intellectuals are tasked with developing an understanding of their problematic entanglement with hegemonic forces and their function as 'confidence builder'. This would imply associating themselves with members of subaltern social groups and movements (becoming intellectuals through a social function), identifying common concerns, building class alliances and, through this process, initiating the absorption of the body of intellectuals for a common counterhegemonic struggle. The prerequisite for this would be the development of organic intellectuals as ideological leaders of their respective social groups, as well as the articulation of a principle, capable of absorbing other classes and social groups into a new emerging hegemonic system. This absorption can only happen within civil society, outside of political society, alongside the production of a new 'common sense'. Or, as Ramos 1982 states, the success of such a task would depend 'on the perception by these classes that the hegemonic class no longer assumes a representative appearance vis-a-vis the subaltern class elements'. A principle that Jacques Rancière (2006) further conceptualized is his reformulation of the political, which he saw as a struggle between the established social order and its excluded part. Indeed, Rancière, like Gramsci, considered the very idea that only

traditional intellectuals occupy society's 'thinking space' as preposterous (Garrett 2020).

Fanon (1967), during his participation in, and analysis of, the African decolonization struggles, attributes importance to the colonized/native intellectual, requesting the intellectual to return to his people, and articulate their revolutionary project, through the construction of national-popular literature (cf. Srivastava 2012). For Capuzzo and Mezzadra (2012, p. 49) it is 'in this framework that the figure of the "subaltern" becomes a subject of history, with a specific gaze on the cultural forms of expression'. Hence, the public struggle for social transformation by civil society, with the participation of the 'countless multitudes', in modern societies (cf. Buttigieg 1995, p. 20), forges social alliances between intellectuals and social groups and begins to articulate alternative hegemonic projects, orientated by ideological intellectual leadership (Ilal, Kleibl & Munck 2014).

Gramsci asserts that it is through the activities and autonomous organisations in civil society that the subaltern masses will acquire their freedom, or independence from the ruling capitalist classes and their allied intellectuals, who uphold the ideology of the ruling classes. At this point we can see parallels between Gramsci's conceptions of the intellectual, the education system and civil society (1971), Paulo Freire`s elaboration of the 'Pedagogy of the Oppressed (1970) and Franz Fanon's understanding of the role of the colonized intellectuals (1967). Gramsci, just like Freire and Fanon some years later, puts the development of independent political consciousness and ideological leadership of the subaltern, or oppressed masses, at the centre of his theory of social and political change (based on the critical analysis of the education system and the type of intellectuals it produces):

> Education, culture, the widespread organisation of knowledge and experience constitute the independence of the masses from the intellectuals. The most intelligent phase of the struggle against the despotism of career intellectuals and against those who exercise authority by divine right consists in the effort to enrich culture and

heighten consciousness. And this effort cannot be postponed until tomorrow or until such time as when we are politically free. It is itself freedom, it is itself the stimulus and the condition for action (Gramsci cited in Buttigieg 1995, p. 20).

Looking at the continual denial of the recognition of refugees as equal citizens and associated with this, the rejection of their knowledge and agency, human rights, and dignity, we can see how the various roles of intellectuals are contributing towards the hegemonial colonial power matrix, enshrined in the migration management system. This, according to Apitzsch (2016), seems to be an 'under-analysed' central argument of Gramsci's thoughts in the context of contemporary migration management debates. Turning then to the position of Social Workers within this system, it is unclear if, under the globally dominant Western understanding of Social Work, they could be categorized as 'organic' or 'traditional' intellectuals. This, as we will argue, depends on the Social Worker's political consciousness, understanding of culture, closeness to subaltern struggles and the approach being taken to issues of social justice. In order to explicate this, in the next section of this chapter we will look at the historical developments and positionalities of Social Work, and the various functional changes it has gone through. This will be followed by a discussion of social work's entanglement with contemporary migration management.

Social Work – a historical perspective
Since its origin, Social Work was closely associated with the emerging capitalist industrial society of the late 19th century. Whilst its history can be tracked in different ways and from various perspectives, the confrontation with the 'social question' was always central to social work's ambition. In Britain, the Charity Organisation Society (COS), founded in the 1870s, responded to the increasing misery of large parts of its population by distinguishing between the 'deserving' and 'undeserving' poor, a distinction supposedly based on a 'scientific case by case' analysis. The COS approach was later significantly challenged

from the almost oppositional 'Settlement Movement', which began in Britain in the late 1800s, later also spreading to America (Ferguson 2009).

The reformist Settlement Movement took a much broader social justice approach to alieviating poverty. It aimed to directly support the increasingly struggling urban poor, including immigrant worker communities. Its high point was the 1920s when British and American social workers began to follow the broad vision of the movement. They were inspired by the work of American Settlement Movement theoretician, Jane Addams, who was also a feminist and peace activist. Her vision, and that of other Settlement leaders, was to bring the rich and the poor, as well as the various cultural influences from immigrant communities together, in physical proximity and social interconnectedness. Through the establishment of so-called 'settlement houses' in poor urban areas, services such as day care, education and healthcare were provided for the marginalized poor, alongside community organizing and support for the unification of exploited workers (Wade 2004). These Social Work strategies, in a Gramscian sense, could be viewed as an attempt to create a new 'common sense', linked to a multitude of cultural worldviews. They were also part of a political Social Work response to the structural barriers poor immigrant families were facing in their spatially segregated neighbourhoods (ibid). In Germany, Social Work followed a similar dual approach of charity and social movement approximation (Niemeyer 2012).

Around this time, the dominant classes in the Global North were trying to solve the enormous social question, exacerbated by the global economic crisis, through the institution of various social reforms within the existing capitalist system. In central Europe, the rise of the welfare state led to a certain professionalization of Social Work. In this context, Social Work became the executive organ of government social policies and responsible for counteracting the more negative impacts of the capitalist system on the people at the lowest level of the capitalist class system. Co-opted as 'confidence builder' by policy makers, Social Work was positioned between the state and the workers' precariat in a time of capitalist expansion. On the one side, it was

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tasked with the hierachization, subordination and integration of the work force, alongside social categories such as race, class and gender. On the other, it was influenced by social movements such as those of women, workers and migrants, and their fight for rights for their members. Within this absurd system, social workers have often chosen contradictory responses to systemic exclusion and structural violence. In Germany, where the Nazis came to power in 1933, Social Work's initial emancipatory potential was replaced with fascist ideology, that eventually absorbed social workers into the National Socialist German Workers' Party's (NSDAP) Department of Health. Here, they became the front-line workers tasked with identifying individuals and families considered 'life unworthy of life' (Salustowicz 2012, Gehlenborg 2008, Kunstreich 2003), in a dehumanizing political system which killed millions of Jews, Sinti and Roma, Communists, People of Colour, the Disabled and Homosexuals.

After World War II, British and American Social Workers, involved in the reconstruction of Western German social services and Social Work education (Salustowicz 2012, Thole 2012) opted for the adaptation of clinical casework, despite some opposition from people linked with the 'settlement movement' (Ferguson 2009). In contrast, in Eastern Germany and the wider Union of Soviet Socialist Republics (USSR), Social policy and Social Work were designed to serve exclusively the goals of the communist state, and social work education focused broadly on theories of collective social justice and equality (Zaviršek 2014). Towards the latter half of the 20th Century new studies critiqued the Western mainstream individualist clinical approach to Social Work, pointing out its failure to address problems associated with increasing structural poverty (Ferguson 2009). In the US, Raul Alinsky's (1971) influential radical social work ideas emerged, associated with his book 'Rules for the Radicals', inspiring social workers all around the world to reconnect to progressive social movements and community organizing. However, due to conservative governments coming to power around the 1980s, radical Social Work experienced a rapid decline and the so-called 'cultural turn' moved Social Work further away from structural

class-based Marxist analysis to questions of identity and difference (Williams 1996).

With the end of the cold war in the late 1990s and the the globalization of neoliberalism, Social Work moved further towards an evidence-based managerial profession, linked to social administration of the poor and those considered deviant. Case management became the preferred method of Social Work intervention in the Global North (Thole 2012) and beyond. What followed was the academization of Social Work and its approximation to modern positivist natural science methods. The profession associated itself closer to the expansion of capitalism and neoliberalism. Both are systems that look at social problems as the product of individual deviances, rather than, following Marx's analysis, as 'public causes of private pain' (Lavalette 2020).

Looking to the Global South, where Social Work was 'imported' during colonial times, the same ideological orientation continued beyond liberation. This led to an alienation of Social Work approaches from the deep structural and poverty-related problems associated with colonial and postcolonial violence. The neoliberal structural adjustment programmes imposed by the World Bank and the IMF, requiring African governments to privatize entire public service sectors, further amplified this trend. This led to the increase in the presence of Western INGOs, with whcih some Southern Social Workers found employment (Kleibl et al 2020). To varying degrees. INGOs took over many of the postcolonial state tasks, in particular those related to poverty reduction and social cohesion. This, inevitably, led to a weakening of the newly born postcolonial states' capacity to attend to their populations needs, at a time when decolonization of the economic and social spheres was an unfinished endeavour. In this context, Social Work in the Global South became strongly associated with Western cultural imperialism, and the continuation of colonial hegemony, through the implementation of a Western top-down civil society concept. It was applied through an apolitical INGO social service-delivery model. subordinating local conceptions of civil society linked to revolutionary change (Kleibl 2021). Gramsci's 'view from below'

concept of civil society, providing space for counterhegemonic activities, would have been more attuned to Southern realities.

It was in Latin America around the 1960s, where the profession turned again into a more critical and political profession, influenced by Dependency Theory:

> Thirty-five years ago, when people began to talk about the reconceptualization of Social Work in Latin America, a process characterized by the conscious analysis of the reality and identity of Latin America was beginning. Philosophy and the theology of liberation, the awakening of the Dependency Theory, in education the arise of Liberalizing Popular Education in Social work led to the reconceptualization (Eroles, 2004 p. 99)

This critical and political model of Social Work appears particularly well connected with concepts Gramsci elaborated during his lifetime, in particular the 'Southern Question' in combination with his understanding of the "'new' intellectual. Under these influences, Social Work in the South started to develop its own intervention theories, approaches and methods, while in the Global North, it remained broadly bound to a positivist and individualist way of working. While Social Work representatives from the South are still impacted by colonial imports, they argue in favour of a model independent from its 'exploitative colonial roots' and recognising 'indigenisation, localisation, authentication and reconceptualization' (Lutz, Kleibl & Neureither 2021). Paolo Freire is one of the most influential representative of this Southern approach and his popular education and liberation pedagogics have since been deconstructed and reconstructed, in the contexts of changes caused by globalization and new forms of power (Mejía 2016). All of this is part of a post-colonial critique of Western hegemonial Social Work approaches, with its often-decontextualized human rights orientation that regards itself as being universal and context-independent (Röh 2020).

We would argue that these anti-colonial and counter-hegemonic arguments are influenced by Gramsci's views on the

'Southern Question'. If writing his prison notebooks in the context of today's globalised world, he would certainly link the exploitation of raw materials and the need for cheap labour from countries of the Global South with the economic growth agenda of the Global North and the existence of its privileged welfare systems. Uneven development, which he wrote of in relation to the 'Southern Question', is the main stimulator of today's global forced migration regime. Looking back at the history of Social Work in Germany, as discussed above, it is striking to note that in today's migration management system, we see the revival of human categorization along national and religious lines, and dispersal of people on the basis of their being refugees, black, asylum seekers, Muslim Arab, 'economic migrants' etc…(Mayo 2016, p. 143).

Consequently, looking into the function(s) of Social Work in migration management requires consideration of the postcolonial context that allocates migrants in Europe to a subaltern position, based on their ex-colonial and postcolonial histories. This leads us to the crucial question of 'Identity Politics' and Social Work's ambivalent role in relation to migration policies. Hall (1978, p. 31) observes that 'race' can function as a key 'lens through which people come to perceive that a crisis is developing' and can be 'the framework through which the crisis is experienced.'

Migration Management and Social Work
In this section of the chapter, we bring our focus to the social worker's role in migration management, specifically in the context of the 'refugee crisis'. There is one word that can accurately summarize the goal and principles behind the European management of the 'refugee crisis' and that is *deterrence*. From the moment the EU – Turkey deal was struck in 2016, it was evident that the intention was to deter prospective migrants from undertaking travel to Europe in the first place. The narrative pointed to the dangers of the perilous journey to, and across, the Mediterranean Sea, the extremely long periods of waiting in poor detention facilities and the insensitive, lengthy and, often biased, asylum granting processes. This view of the European approach was initially greeted with scepticism and

seen as belonging to a politically radical cohort. But in the light of continuous developments in the 'refugee crisis', it became more widely accepted and documented in academic analyses (Vedsted-Hansen 1999, Mountz 2011, Oliver 2017, Xypolytas 2018, 2019). Over the past seven years, it has become abundantly clear that the combination of obstacles and dangers faced by mobile people has resulted in countless traumatized migrants and an enormous, and unknown, number of deaths. While many individual cases of trauma and death have been reported, causing worldwide shock and outrage, official political discourse in the European Union, and its member states, continues with the rhetoric of human rights and European values.

There is a profound irony in the fact that, despite the extreme efforts of Europe, these deterrent migration policies have proved unsuccessful. Not only have they failed to deter people from attempting to cross European borders, but they have also led to an unprecedented legitimation crisis within the European Union (Carrera et al 2019), as the cloaked rhetoric of benevolence stood naked in its malice in the light of migrants' misery and despair. However, the official response from Europe to increasing migration and its own internal crisis, was to further the authoritarian character of migration policy, and to pander to the xenophobic and neo-colonial voices, in seeking a European-wide consensus on the necessity for this type of migration control (Schinkel 2017).

There are certain key changes in the everyday practices of refugee management that demonstrate this move towards greater authoritarianism. *Firstly*, the illegal pushbacks, in which not only the various Coast Guards of different member states are involved (mainly Greek, Turkish and Italian), but also the European Border and Coastguard Agency (FRONTEX). Reports from NGOs and media networks suggest that thousands of refugees have been illegally sent back in the past couple of years, and often in a manner that is clearly and unashamedly putting migrants' lives in extreme danger (Fallon 2020, McKernan 2021). This has led to a problematic relationship between EU and FRONTEX officials (Nielsen 2020), as the active engagement in pushback severely

undermines any humanitarian narrative from official institutions of the European Union.

Secondly, there has been a clear move towards the utilisation of 'closed' refugee camps along the European borders, which replace the previous more 'open' living arrangements. The outbreak of COVID-19 provided a narrative of public health to legitimize such detention, even though it has actually been a critical aspect of migration policy since 2015. An aspect of this situation and attendant narrative which is particularly reprehensible is that, while there are references to the need for social distancing in order to minimise the spread of the COVID–19 virus, this relates not to the living conditions inside the camps, but to minimizing the contact refugees with the local population. Meanwhile, within the camps, people live in cramped conditions, with absolutely no safety protocols in place. These new closed camps are being build in various islands in Greece, like Lesvos and Samos. Unlike the situation with the previous camps, these are officially set up and run by the European authorities, this is a critical point of departure from the previous European strategy which attributed the 'dysfunctions" of refugee management to institutional decisions and actions taken by member states (Xypolytas 2019). This new situation makes it impossible for the EU to disassociate itself from its deterrent migration policy.

However, the role of member states should not be entirely discounted in this new situation as internal developments within states also impacts on approaches to refugee management. For example, the election of a right-wing government in Greece in 2019 contributed to deterioration of an already very bad situation, as it pursued a deterrent migration policy, making specific changes to honour it. In the past two years, there has been a reduction in asylum-granting decisions. Concerns have been raised about the changed criteria for establishing vulnerability and about the way in which asylum-seeking interviews are conducted (Psaropoulos 2020). Furthermore, punitive and far-reaching court rulings are often handed down to refugees without evidence of wrongdoing having been established (Smith 2021),

The role of social work in migration management

We suggest that it becomes evident from the outline of the migration management system which we have presented here, that the role of social workers within it is a complex one and that any analysis and evaluation of it must reflect that complexity. From the outset, one can see the non-harmonious coexistence of different approaches to social work by different actors (Munteanu and Barron 2021). Variations in approach are informed by both institutional and personal characteristics and are profoundly influenced by the historical development of social work as presented earlier. Essentially social work operates on a continuum between two extremes. At one end of the continuum there is a more or less uncritical adoption of European migration policy and adherence to it. A little further along is passive acceptance of the policy, combined with efforts to maximize the benefits for the refugees within its confines. At the other end, is a conscious effort to support refugees by effectively monitoring, questioning, and undermining European migration policy. It is also the case that positioning on the continuum is not necessarily static, as developments affect individual and organisational decisions. Furthermore, as migration policy moves closer to an extreme form of official de-prioritization of human rights and authoritarian disciplining, it becomes increasingly difficult for actors to situate themselves in more mid positions along the continuum. The result is an increasingly divided outlook on the role of social work in the 'refugee crisis' as well as on the ethical aspects of this involvement.

The two pole positions, as outlined, clearly lead to very different approaches to the work and in the field, such as in hotspots on the Greek border, they manifest themselves in a variety of ways. On the one hand, we see a considerable rise in the active engagement of NGOs whose goal is the monitoring of human rights violations in the context of refugee management, effectively questioning and undermining official migration policy. Social workers within these organisations are in the front line as they actively engage in scrutinizing and publicizing illegal pushbacks perpetrated by the Greek Coast Guard and FRONTEX or provide legal defence for refugees who are at the mercy of,

frequently, punitive court decisions. On the other hand, many NGOs, as well as public sector social workers, operate inside and outside the new 'closed' camps trying to maximize benefits for their 'clients', within the European migration framework. However, it is not only in social work organisational decisions or individual actions of social workers that one sees the difference. The polarisation is increasingly evident in consumption choices, socialization practices and the overall lifestyle of people who spend their working day in what is called refugee management (Tsartas et al 2020).

The fact of this radically divided approach to social work within the migration field, leads us to two questions which this chapter has set out to address. Firstly, what are the factors that have led to this division? Secondly, taking direction from the work of Gramsci, Freire and Fanon, what do we see as the role and function of social workers in this field into the near future. In other words, where does the profession need to position itself, based on its human rights orientation?

In attempting to answer the first question, we focus on one feature that seems to define all others, that is the conscious effort to depoliticize the refugee experience and co-opt social workers into a supposedly EU value-based and regulating migration management system. Since 2015, when the reality of the permanent need for mobility for hundreds of thousands of people kicked in, the management of migration has been profoundly political. This is not purely as a result of governments' decisions for dealing with the situation. It also arises from the conscious exercise of power over the refugee population, which takes place in zones of exception where the 'common sense' of European human dignity seems to be switched off. Refugee management consists of a range of disciplining mechanisms that are there to inform migrants of their social position in European societies. But the reality is that each of these mechanisms is concealed by a veil of bureaucracy, or the utilization of science, making it difficult for the migrant to access. These hurdles are presented as inevitable in the context of significant levels of migration. For example, the long waiting periods, which are an essential discipline and

pacification tool, are presented as a bureaucratic complication (Auyero 2011, Jacobsen et al 2021).

We now turn to the use of scientific discourse and practice to victimize and depoliticize both the migrant subject and the refugee experience. It is in this process that social work is heavily involved (alongside other disciplines, e.g., psychology) and it is the main influencing factor in the division of approaches of professionals in the field.

The portrayal of the refugee as a passive victim, especially on the basis of what has occurred in the country of origin, is based on an ideologically loaded set of assumptions. In order to exemplify this, we will briefly look at Post Traumatic Stress Disorder (PTSD). This is a condition diagnosed in many refugees in the camps of the European borderline. While PTSD is an acknowledged condition recognised by DSM-IV (Diagnostic and Statistical Manual of Mental Disorders) of the American Psychiatric Association, the assumptions behind its use have been heavily criticised (Becker 1995, Hernandez 2002). One of the main problems identifiesd relates to the use of the prefix 'post', as it implies that the trauma was inflicted previously and that the disorder simply involves the inability to cope with the consequences. In the context of the refugee experience this is problematic for three important reasons; a) the traumatization of individuals is not something that ends upon entry to Europe but can continue in refugee camps, b) the refugee's experience of trauma may only begin when they encounter the migration management system and the obstacles and uncertainties that are built into it. c) neo-colonial narratives are reiterated, as refugees, upon entrance to European soil, are supposedly treated for the damage (physical and emotional) inflicted upon them in countries of origin in the Global South.

The attribution of PTSD diagnoses in evaluating the refugee experience relates to the essential political process of victimization. Rendering refugees into passive victims in need of assistance depoliticizes their subjectivity, defining them as unable to control their future. Furthermore, their dependence upon western humanitarian 'experts', such as social workers or psychologists, re-inforces their lack of control and solidifies the

seemingly – albeit deceptively – benevolent character of refugee management. In other words, what appears as benign social protection, represents a crucial form of control that pacifies refugees and prevents them from questioning and actively undermining European migration policy. This construction of the *apolitical* and *vulnerable* migrant subject has been a central feature of this policy and of the overall management of the 'refugee crisis'. The granting of asylum itself depends on these two essential aspects and many professionals in the field work to construct such migrant personas in a sincere effort to help them gain asylum. Yet, the questions remain. Should social scientists and social work practitioners be actively engaged in policy and practice that effectively undermines the people they are supposed to help? And what should this help look like?

Moving away from 'social protection' to providing protection from refugee management has been a conscious decision for many social workers who have refused to play an active role in the continuation of this process of marginalization. They see the duty to promote and defend human rights and social justice holistically as an inherent aspect of the definition of social work, and impossible to safeguard in the existing refugee management context. On the contrary, it is in questioning and undermining policy that they feel closer to the principles and guidelines of their profession. How then to provide help to refugees in this context? The proposed approach is based on defending the interests of refugees, in the light of the goals of those who stand against them. What the previous analysis suggests is that migrants are confronted with a policy that aims to pacify, victimize, and remove from them the ability to alter their environment, an ability that is absolutely central to notions of human freedom and sovereignty. Following Gramscian theory, this would imply that 'traditional' social scientists, not only analyse, but precisely recognize their inherent social function, through taking part in monitoring human rights abuses and supporting the building of progressive social alliances. Through this process, they initiate the absorption of the body of intellectuals in a conscious effort of resistance against the goals of European migration policy. In order for this to be grounded in subaltern realities, organic

intellectuals and ideological leaders within the refugee communities will need to be supported and 'new' principles and values, based on the dignity and human rights of all, will need to be defined and demanded. This absorption can only happen within civil society, where the development of a new 'common sense' can take place.

We contend that the further development of policy and action for the emancipation of refugees is not the role of those of us who are not migrants ourselves. It is up to refugees themselves to define such plans. What we can offer is access to knowledge and experience gained from other emancipatory projects throughout the world, and to open a new 'thinking space' in which freedom can be practiced, and refugees have the opportunity to critically engage with their reality and discover how to participate in the transformation of migration policies. This would be an entirely democratic exercise, linked to the seeds of freedom planted in other areas of the world in their struggle against colonial and imperialist oppression. It is a struggle that begins with understanding one's social position in relation – and in opposition – to oppressive political power (Freire 1970). This form of intervention is, above all, educational in character, providing to refugees the tools with which they themselves will claim what is rightfully theirs, their freedom and sovereignty.

Social Work as Liberation

Inter-ethnic solidarity necessitates work of an educational nature to contribute towards improving the situation. Providing effective anti-racist education, predicated on an understanding of colonialism and neo-colonialism, and grounded in both cultural understanding and political economy, is one of the greatest challenges facing those committed to a socialist, anti-neoliberal politics in the Mediterranean and elsewhere. This work is broadly educational as was the work which Gramsci was engaged in when attempting to generate revolutionary working-class consciousness in this country (Mayo 2016, p. 144)

The above quote describes quite well what education programmes with, and for, refugees affected by the postcolonial 'refugee crisis' in Greece and other European countries should be about. We, as academics, must look to the work of significant political educators, such as Antonio Gramsci, Paolo Freire and Ignacio Martín-Baró, as pathways to new consciousness. They point us to the needs and opportunities to engage with refugees on the structures of oppression, which produce and reproduce social, political and economic exclusion. While writing at different periods of the 20th century, all three of these theorists were highly critical of how the Western intellectual contributed to this oppression, through aligning themselves with the hegemonic capitalist system. Furthermore, all three made substantial contributions to a new understanding of the 'philosophy of praxis' that takes the worldviews of the subaltern as the starting point for transformative action with the various oppressed social groups, which were at the centre of their pedagogical interests.

In particular the work of Freire (1970), the Pedagogy of the Oppressed, serves as a foundation of ideas for strategic political action in Social Work (Mayo 2020). As part of his pedagogy of liberation, people are essentially considered as the experts on, and protagonists of, their own lives; hence, the alienating technical clinical case orientated role of the social worker is seen as redundant. A crucial takeaway from the work of Gramsci is that the exploration and progressive modification of the 'common sense' contributes to peoples' understanding of their own life worlds and opportunities, alongside their historical and geographical conditions.

Latterly, Martín-Baró, working in the field of liberation psychology, which he more or less defined, emphasised the role of the psychologist in assisting people with trauma. Moving away from clinical and individualist approaches, he introduced the concept of 'psychosocial trauma' (Martín-Baró 1989) to underscore the cause of, as well as the solution to, the problems faced by those who have experienced the destructive effects of political and military power. For Martín-Baró, trauma is not an individual dysfunction but a normal response to an absolutely

abnormal situation. The solution does not lie in detached medical diagnoses and prescription of medication that focus on the individual and his suffering. It lies instead in identifying the social cause of the problem (thus destigmatising the individual), in restoring stable and trusting social relations and, above all, in strengthening community's capacity for collective action (Aron and Corne 1994).

Conclusions and way forward

We conclude that in today's dominant model, social workers in praxis, education and research broadly support a function of technical service provision, justifying their interventions with knowledge from disciplines such as psychology, educational science, law and social administration. The admiration of these disciplines and the allocation of research and teaching chairs in Social Work departments facilitated the profession's inclusion into the 'higher' academic world of 'traditional intellectuals'. This positioning has contributed to their co-option to the existing hegemonic systems, in order to implement Western governments' dominant social development and migration policies. This, in turn, has alienated many social workers from the people they are supposed to serve (Yuill 2018). This alienation is particulary stark in the case of refugees and migrants who continue to suffer the consequences of colonialism and global unequal development. This is the situation that has existed in Europe for some time and, more recently, has been extended to countries of the Global South, primarily through Western social work curriculum imports and INGOs interventions into local civil societies and their struggles for postcolonial justice.

Freire's pedagogical views demand a rejection of the colonial and rather technical and instrumental Social Work of the Global North, currently being applied in migration management. He posits the necessary abandoning of the liberal character of a value-free science. In line with his theory, this would require social workers to adopt more radical and liberating positions, in particular in today's global migration regime. In order to do this, they need to first liberate themselves from institutions, migration policies and work regulations, controlled by national and

European politics, which, as our analysis has shown, have contributed to most of the social problems they are supposed to tackle. Social Work must develop its own agency, return to its inherent social function, and engage with migration management as a political actor, with the goal of increased political participation of refugees. Social work, as a liberating practice, requires refocussing beyond its current Western focus on the individual. It needs to broaden that focus to reflect its positionality, hence disrupting exploitation, oppression, racial and religious profiling, victimization and categorization within the migration management system, and its underlying social structures that minimise people's opportunities and capabilities (cf. Lavalette and Ioakimidis 2011). This model of Social Work would challenge the political sphere and would adopt alternative and opposing views about migration politics and the institutional regimes associated with them. The struggle between the poor and the rich, between the powerful and the subaltern, migrants and non-migrants is not a problem to be resolved by state and humanitarian agencies but is politics itself (Rancière 2006).

As the marginalised and voiceless become more aware of their position and stand up for their rights, social structures are revised. For Social Work, this means withdrawing from the societal consensus around the subaltern position of refugees and the political contracts of institutionalised migration politics between the European Union and so called Third States. The work of Fanon, Rancière, Freire and Martin-Baro, may aid critical reflection on social work and lead to a re-ordering of the political within the profession. This approach would draw on theories of resistance, movement building, liberation and utopia to support more radical expressions of Social Work. As evidenced and discussed, Social Work of the Global North is currently bound to providing services in an existing dehumanizing system, such as in migration management at the EU external border and in detention centres. We believe it can develop a new radicalism, inspired by Social Work of the South, particularly in Latin America, which is oriented towards social movements. The ethical substance of a society must be measured in terms of the extent to which all its members enjoy substantial freedoms or, to

quote Hannah Arendt (1951), whose words are more attuned to refugees' trajectories, 'the right to have rights, which provides access to a political community'.

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