EPRA International Journal of Economic Growth and Environmental Issues- Peer Reviewed Journal
ISSN: 2321-6247
Volume: 12 | Issue: 11 | December 2024 | Journal DOI: 10.36713/epra0713 | SJIF Impact Factor (2024): 8.619

REFLECTIONS ON THEORIES OF HUMAN MIGRATION IN THE WORLD-SYSTEM

Jorge Martínez Pérez[1], Imelda Ortiz Medina[2], Marlen Hernández Ortiz[3]
[1]Graduate in Economics, PhD. in Religious Sciences from the Complutense University of Madrid, Professor-Researcher at the History Academic Unit of the Autonomous University of Zacatecas, Mexico,.
[2]PhD. in Government and Public Administration from the Complutense University of Madrid and the Ortega y Gasset University Research Institute, professor-researcher at the Economics Academic Unit of the Autonomous University of Zacatecas, (Author for Correspondence)
[3]PhD. in Materials Sciences from the Autonomous University of Sonora, Mexico, Professor-Researcher at the Economics Academic Unit of the Autonomous University of Zacatecas, México,

Article DOI: https://doi.org/10.36713/epra19558
DOI No: 10.36713/epra19558

----------ABSTRACT----------
Human migration is as ancient as humanity itself. While this fact is easy to identify, explaining its causes, processes, manifestations, and consequences is far more complex. Existing theories have largely focused on studying the causes of migration, but they differ significantly in analyzing its consequences. Some consider migration to be a temporary process, while others view it as a permanent and inherent feature of the capitalist World-System. The conclusion emphasizes the necessity of conducting comprehensive, interdisciplinary studies that encompass the phenomenon in all its complexity, while also recognizing that any theory is only applicable to a specific time and place.
KEYWORDS— *Human migration, theories, World-System.*----------

INTRODUCTION

Migration is a complex phenomenon, and its study is often equally complex. Various theories have attempted to analyze migration, fundamentally seeking to answer two key questions: *What are the causes of migration?* and *What are its effects?* This paper examines the theories that address these questions, highlighting their characteristics, strengths, and weaknesses.

METHODOLOGY

Procedure

a) The analytical and comparative methods were employed to examine theories that seek to explain migratory phenomena.
b) A highly representative bibliographic selection was made to present the results reached by different studies.
c) The paper concludes with a synthesis that aims to evaluate and display the resulting similarities and differences among these theories.

ANALYSIS AND RESULTS

What is Migration?
Migration, in its broadest sense, is defined as the "geographic displacement of individuals or groups, generally for economic and social reasons" (ASALE & RAE, n.d.). However, migration is not exclusive to humans; numerous species of living beings engage in habitual or sporadic displacements across both time and space.

In this sense, migration can be said to be as old as humanity itself and as ancient as life on Earth. It is an integral part of the majority of living beings in their constant struggle for survival, adaptation, reproduction, and expansion.
This framework sets the stage for further discussion of migration theories, examining their ability to address the multifaceted nature of migration within the broader context of historical, social, and economic systems. The following

EPRA International Journal of Economic Growth and Environmental Issues- Peer Reviewed Journal
ISSN: 2321-6247
Volume: 12 | Issue: 11 | December 2024 | Journal DOI: 10.36713/epra0713 | SJIF Impact Factor (2024): 8.619

sections will evaluate existing theories, their approaches, and their limitations in understanding this enduring phenomenon.

Theories on Migration

For Eva-María Geigl (2021), the history of humanity is the history of migrations. Through paleogenomics—a branch of genetics that complements archaeology and anthropology—it has been determined, by analyzing the DNA of human population remains, that so-called "pure races" do not exist; instead, all populations have experienced and continue to experience exchanges in their genetic heritage. Such studies allow us to uncover numerous aspects, including migratory routes followed by groups and populations, their places of origin, their movements, and their destinations—something akin to a genetic-geographic tree of groups and migrations.

Taking this into account, it can be stated that while, *stricto sensu*, Alan Simmons (as cited in Piché, 2013, p. 154) defines migration as "(…) the change of residence, the change of employment, and the change of social relationships," the migratory phenomenon is far more complex than it appears. This complexity has intensified over time, making its causes, processes, and manifestations highly heterogeneous and, at times, challenging to study.

Key Questions on Migration

Why do people migrate?
What are the effects of migration?
Several theories have sought to explain the phenomenon of migration, each revealing specific aspects that others overlook or address only tangentially. At the outset, it can be noted that it is easier to discuss the causes of migration, as there are more studies and greater consensus on this topic, than it is to analyze its effects, for which there is less literature, fewer statistics, and greater controversy.

It is important to clarify that this work focuses on migration in the contemporary world, which has its roots in the birth of modernity (15th and 16th centuries, during the Italian Renaissance). From this period onward, the global population began to integrate into global capitalism—a system that cannot be analyzed without considering the components that constitute it.

In this regard, Carpinetti (2018) notes that existing theories to explain the migratory phenomenon fundamentally adhere to specific scientific paradigms and cannot be conceived outside of these paradigms or the social structures that seek to legitimize them "scientifically." Above all, it must be understood that these theories are shaped more by political factors than by methodological ones, which explains the prevalence of some theories over others. According to the author, a theory holds value only insofar as it remains within these methodological and socio-economic-political limits or, alternatively, insofar as it is not applied outside of these boundaries.

This highlights the interplay between scientific paradigms, political motivations, and the structural dynamics of modernity in shaping the study of migration—a phenomenon that is as old as humanity yet increasingly complex in its manifestations and implications.

Migration: Transitory or Structural?

When addressing the fundamental question of whether migration is a circumstantial, transitory, and fleeting phenomenon, or a structural, constant, and permanent one, Carpinetti identifies two positions:
a) The positivist and neopositivist theory.
b) The sociocritical theory.
For positivism and neopositivism, migration is seen as a temporary phenomenon. In contrast, sociocritical theory views it as structural and permanent. Furthermore, while the former focuses primarily on the study of immigration, the latter emphasizes the study of emigration. Positivist approaches, given that they stem from societies predominantly composed of immigrants, have produced an overabundance of analyses on immigration and a relative deficit in studies of emigration. Meanwhile, sociocritical approaches, despite belonging to societies characterized by emigration, have scarcely studied migration at all. However, both theories agree on one fundamental point: the principal factor or motivation behind migration is economic. Migrants typically move from regions with little or no employment opportunities to areas with an abundance of such opportunities.

The Three Phases of Migration Theory Development

First Phase: Demographic and Geographic Variables

In the initial phase, the focus is on demographic and geographic variables. Rather than investigating the causes of migration, the emphasis is placed on identifying regular patterns. This phase studies European movements from the Renaissance, driven by overseas discoveries and conquests, up to the global impact and expansion of the Industrial Revolution. The primary goal during this period was to uncover the "laws" and patterns that govern migratory flows, deliberately setting aside the question of causality.

Second Phase: The Economic Paradigm

The second phase begins in the postwar period, where economic theories, particularly neoclassical theory, become the dominant paradigm. Neoclassical theory prioritizes the rational choice of the modern individual, free competition, and the maximization of capital gains within a context of regional and global wage disparities. This approach studies individuals' rational choices using mathematical models.

However, a significant shift occurs during this period, transitioning from a positivist to a relativist conception of migration. This shift is influenced by developments in physics (e.g., the work of A. Einstein and W. Heisenberg) and the philosophy of L. Wittgenstein.

Key concepts, such as the "uncertainty principle" and the influence of the observer on the field, are introduced. This leads to the abandonment of the idea of total objectivity, acknowledging that all observations carry a degree of subjectivity. Nevertheless, migration continued to be studied as a natural and necessary—yet temporary—component of a system of free competition that was assumed to naturally tend toward optimal equilibrium. This perspective also presupposed that migrants would eventually return to their place of origin.

This development illustrates the growing complexity of migration theories, as they begin to incorporate interdisciplinary perspectives and acknowledge the multifaceted nature of migratory phenomena.

Third Phase: The Sociological Paradigm of Sociocriticism

Beginning in the 1960s, the study of migration came to be dominated by sociology, adopting the sociocritical paradigm. This paradigm is influenced by Hegelian historicism but is primarily rooted in Marxist thought. It posits that the researcher, the subject of investigation, and the categories used for research are all influenced and determined by their historical context. The dynamics of this context are shaped by Hegelian dialectics: thesis, antithesis, and synthesis.

In this framework, the study of migration is not the starting point but the result of examining historical processes as part of a larger whole, such as the so-called "World-System." This system is characterized by the unequal distribution of productive factors—resources, capital, and labor—between core economies and peripheral ones. Core economies dominate and exploit resources, while peripheral economies serve as suppliers of cheap labor and raw materials.

Positivist vs. Sociocritical Perspectives

The positivist and neopositivist perspectives are founded on the premise of a system that is balanced or naturally tends toward equilibrium. From this viewpoint, migration is seen as a necessary evil—temporary and accessory to the functioning of the system.

In contrast, the sociocritical paradigm argues that systemic imbalance is inherent to the global economic structure. Therefore, migration, in both its forms—emigration and immigration—must be understood as a structural and permanent feature of this mode of production.

A Common Thread: The Economic Factor

Across these paradigms, one conclusion remains consistent: the predominance of the economic factor in explaining migration. Whether viewed from an individual perspective or through social and global lenses, economic motivations are central. Migrants often seek opportunities in regions with abundant resources and employment, leaving behind areas with scarce or nonexistent prospects.

The sociocritical approach, however, goes further by situating these individual economic decisions within the broader context of global capitalism, where systemic inequalities drive migration as a structural necessity for maintaining the economic status quo.

Relevant Theories on Migration

Piché's Analysis (2013): Causes and Effects

Piché (2013) highlights the most relevant migration theories. What is particularly noteworthy is that, beyond addressing the causes of migration, he also examines its effects on both countries of origin and destination. Furthermore, he questions whether migration actually brings benefits, especially for labor-exporting countries.

European Commission's Perspective (2016)

According to the European Commission (2016), the complexity of migration makes it impossible to explain the phenomenon comprehensively using a single theory. Each theory operates at different levels—micro, macro, meso, structural, or equilibrium—necessitating the incorporation of multiple perspectives and factors into the analysis. Moreover, the distinction between forced and voluntary migration is becoming increasingly insignificant, highlighting the nuanced and multifaceted nature of migratory movements.

Piguet's Contribution (2013): Social Psychology and Motivation

Piguet (2013) argues that one often overlooked aspect of migration is the perspective of social psychology. Migration has predominantly been studied through the lenses of economics and sociology, giving insufficient attention to psychological motivations. The inclusion of motivation theories is crucial, as they reveal that migrants are not always the least resourced, most marginalized, or lowest in social status. On the contrary, migrants often have more resources and sufficient human motivation to venture to other lands in pursuit of success and power. This decision is frequently driven by a sense of self-determination over their lives. Piguet also notes that migration decisions rarely stem from a single factor, emphasizing the need for a multidimensional understanding of the phenomenon.

Piché's Four Analytical Categories

Returning to Piché (2013), he studies migration theories through what he considers twenty paradigm-setting works, dividing them into four major categories:

a) **Origins and Causes:** Examining micro-individual, macro-structural, gender, and migration network approaches.
b) **Effects:** Evaluating the consequences of migration on countries of origin and destination.
c) **Migration Policies:** Analyzing how policies shape migration flows and rights.
d) **The Pluralistic Approach:** Emphasizing the need to combine multiple perspectives to account for the multifactorial and multidimensional nature of migration.

This comprehensive approach underscores the complexity of migration, requiring not only interdisciplinary insights but also context-specific analyses to address the evolving challenges of the phenomenon.

Origins and Causes of Migration

Piché (2013) categorizes the origins and causes of migration using four main approaches: micro-individual, macro-structural, gender, and migration networks.

Micro-Individual Approach

This approach focuses on personal decision-making, where the individual, considered as human capital, evaluates the costs—both monetary and non-monetary—and benefits of migration as if it were an investment decision. Often, individuals idealize the destination over their place of origin, albeit not always objectively.

Critiques of the Micro-Individual Approach:

It is argued that this approach is less of a theory and more of a classification of migratory factors.
It overemphasizes individual factors at the expense of structural ones.
It is rooted in an evolutionist and Western-centric perspective, framing societies as either archaic or modern.
It assumes Western culture and capitalism are universal models for all societies, which oversimplifies cultural and economic diversity.

EPRA International Journal of Economic Growth and Environmental Issues- Peer Reviewed Journal
ISSN: 2321-6247
Volume: 12 | Issue: 11 | December 2024 | Journal DOI: 10.36713/epra0713 | SJIF Impact Factor (2024): 8.619

Macro-Structural Approaches

In contrast to the micro-individual perspective, macro-structural approaches explain migration decisions not as the product of personal choice but as a consequence of globalization, characterized by the free movement of people, ideas, goods, and services. Migrant flows are conceptualized as part of a circuit or network—primarily international in scope. Migration, from this perspective, is driven not by rational individual choices but by economic and political structural factors. These structures create a complementary relationship between labor-exporting (sending) and labor-receiving (receiving) countries, perpetuating and reproducing labor forces.

Key Theories within Macro-Structural Approaches

Institutional Theory

This theory highlights the creation of a "migration economy," which establishes a complex infrastructure of institutions and individuals—both legal and illegal—such as lawyers, smugglers, and employment agencies. These entities, in seeking their own survival, actively promote migratory flows between countries.

World-Systems Theory:

(Previously discussed: migration flows from peripheral to core countries, perpetuating systemic inequality.)

Dual or Segmented Labor Market Theory:

(Previously discussed: labor market segmentation in receiving economies necessitating migrant labor for jobs undesirable to native workers.)

These approaches and theories underscore the multifaceted nature of migration, blending personal motivations with global structural forces. While micro-individual theories focus on agency and personal rationality, macro-structural approaches provide a broader lens that accounts for systemic inequalities and institutional frameworks driving migration. Both perspectives, despite their limitations, contribute essential insights to understanding the origins and causes of migration.

Theories of Migration: World-Systems and Dual Labor Market

World-Systems Theory

World-Systems Theory explains migration as a flow from underdeveloped, peripheral countries to developed, core countries. This is contrasted by the movement of capital, goods, and machinery in the opposite direction. This dynamic creates a vicious cycle of increasing unemployment in underdeveloped regions, forcing young populations to migrate to more developed areas in search of better opportunities.

Dual or Segmented Labor Market Theory

This theory posits that, regardless of the economic conditions in the countries of origin, destination economies demand cheap labor. Migrants are typically employed in labor segments that the native workforce avoids due to the precarious working conditions, insecurity, and low wages prevalent in these sectors. Migrants, therefore, fill a critical role in sustaining these undesirable labor market segments.

Effects of Migration

According to Piché (2013), the effects of migration can be divided into three categories: economic, political, and social.

Economic Effects

One of the initial challenges in studying economic effects is the methodological controversy surrounding their measurability and determining whether these effects are positive, negative, or uncertain.

In Developed Countries:

The economic impact of immigration in developed countries is often weak or insignificant in the short term due to the vast number of variables involved and the tendency of most studies to focus on short timeframes. However, the potential benefits of immigration generally become evident over longer periods.

Existing research, though limited, suggests that immigration typically has positive effects for both the migrants themselves and the economic structure of the host countries. These benefits include growth, innovation, skill development, capitalization, and improved organization of production.

Additionally, there is no evidence that migrant labor negatively impacts the native labor market, as migrant and native workers often occupy different labor market segments.

In Underdeveloped Countries:
The situation is significantly different in underdeveloped, labor-exporting countries. Here, the essential question arises: *Are migrants and their remittances agents of development?*

There are no definitive answers. International organizations such as the UN and the World Bank consider migrants as agents of change and development. However, many scholars challenge this assertion.

In some cases, migrants and their remittances can contribute to development if there are infrastructural conditions that allow these funds to be used productively, transforming remittances into investments.

When such conditions are absent, remittances merely serve as a means of subsistence and a way to alleviate the poverty of the recipients, without fostering broader economic growth or development.

These perspectives highlight the multifaceted impacts of migration, emphasizing the differences in outcomes between developed and underdeveloped regions. While migration can provide opportunities for individual growth and contribute to economic advancement in host countries, its role as a development tool in countries of origin remains highly contingent on structural and infrastructural conditions.

Migration Policies
Migration policies have historically treated immigration as a privilege for the migrant rather than as a human right. These policies prioritize economic considerations, market needs, and national sovereignty over the rights of migrants. Within this framework, there have been calls for the establishment of global governance to manage migratory flows on a planetary scale, with the goal of creating mutually beneficial outcomes for migrants, as well as for the countries of origin and destination—a "win-win" scenario, borrowing from business jargon.

However, alongside these discussions, there is increasing attention to issues such as mobility, temporary work, and systems that foster illegal immigration and underground economies. These elements often work against the interests and rights of migrants, while favoring employers and host countries. The result is a system that perpetuates inequality and exploitation, undermining the dignity and protection of migrant workers.

The Pluralistic Approach to Migration
Piché's (2013) pluralistic approach to migration offers a critical perspective. He asserts that each of the previously discussed theories only addresses a specific aspect of the phenomenon, and their validity is dependent on the time and place being analyzed. Rather than opposing one another, these theories collectively form a complex puzzle, as migration is a multifactorial and multidimensional phenomenon.

According to Piché, the study of migration must include three critical elements:
Origin and Destination: Acknowledging the dynamics and interactions between the sending and receiving countries.
Levels of Analysis: Incorporating micro, meso, macro, and global levels to capture the full scope of migratory processes.

Economic, Social, and Political Dimensions: Addressing the interconnected and overlapping factors that influence migration.

This holistic framework emphasizes the importance of integrating multiple perspectives to better understand and address the complexities of migration. It recognizes that no single theory can fully explain the phenomenon, highlighting the need for interdisciplinary and context-specific analyses.

Piché's pluralistic approach underscores the idea that migration cannot be reduced to isolated causes or effects but must be viewed as an evolving phenomenon shaped by a wide range of historical, social, and economic factors.

CONCLUSIONS

Migration must be understood within a specific temporal framework and as part of a global system. From this perspective, it becomes essential to study future labor needs, the management of migration by national or supranational states, the dynamics of circular and temporary migration, issues of non-citizenship, the shift in terminology from *migration* to *mobility*, and the contradictions of the neoliberal model, which demands the free movement of production elements while restricting the movement of people and their citizen rights.

Migration has always existed and will continue to exist, but it increasingly requires more comprehensive studies from various fields of the social sciences. An interdisciplinary, panoptic vision is necessary to address the complexity of the phenomenon. However, the analyses conducted on migration cannot be universally applied to all times and places, as they are products of specific contexts.

For instance, the fundamental factors driving migration between South and North America, despite having elements in common with other regions of the world, have dynamics that differ significantly from the factors driving migration from North Africa to Western Europe or from Asia to the United States.

This underscores the importance of context-sensitive approaches that consider the historical, economic, social, and cultural specificities of migratory flows in different regions. Only by adopting such nuanced perspectives can we begin to fully understand and address the multifaceted realities of human migration.

LIMITATIONS

The study presented here is a synthesis of the main migration theories. It does not aim to cover or exhaust the entire theoretical field on the subject but rather to provide a concise and panoramic view of this phenomenon.
Its objective is to present, in a simple yet didactic manner, the key objectives and challenges faced by the study of human migration in the contemporary world. By doing so, it seeks to highlight the complexity of migration while offering a foundational understanding of the theoretical frameworks that underpin its analysis.

REFERENCES

1. *ASALE, R.-, & RAE. (s. f.). Diccionario de la lengua española | Edición del Tricentenario. «Diccionario de la lengua española» - Edición del Tricentenario. Recuperado 31 de marzo de 2022, de https://dle.rae.es/*
2. *Carpinetti, J. (2018). Teorías de las migraciones, paradigmas epistemoló-gicos en las ciencias sociales y condiciones sociales de producción. 59-79.*
3. *European Comission. (2016). Why do people migrate? (Infographic) | Knowledge for policy [Website of Euorepan Union]. European Comission. https://knowledge4policy.ec.europa.eu/publication/why-do-people-migrate-infographic_en*
4. *Geigl, E.-M. (2021, diciembre). El Correo de la UNESCO. trimestral, 56.*
5. *Piché, V. (2013). Les théories migratoires contemporaines au prisme des textes fondateurs. Population, 68(1), 153-178.*
6. *Piguet, É. (2013). Les théories des migrations. Synthèse de la prise de déci-sion individuelle. Revue européenne des migrations internationales, 29(3), Art. 3. https://doi.org/10.4000/remi.6571*