

Consequences of Migration and Remittances for Mexican Transnational Communities*

Dennis Conway

*Department of Geography, Indiana University,
Bloomington, IN 47405*

Jeffrey H. Cohen

*Department of Anthropology, Texas A & M University,
College Station, TX 77843*

Abstract: To better understand the positive contributions return migrants and migrant remittances make in Latin American society, this paper offers a reevaluation of existing conceptual frameworks. Previous research dwelt upon the unproductive nature of expenditures and the difficulties facing return migrants as they reintegrate themselves in home communities, among other problems caused by migration. Drawing upon recent feminist scholarship and the growing body of literature focused on the positive aspects of “migradollars” (U.S. dollars returned by migrants) upon home communities, we propose that remittance investments should be analyzed for their progressive and satisficing effects. We focus on the potential range of household strategies for remittance investment, the ways migrant circulation patterns relate to family and household decision making, and the impact of remittances and migration upon community structure. Finally, using ethnographic data from rural Mexico, we illustrate our argument and demonstrate the dynamic nature of contemporary migration and migrant remittances.

Key words: migration, remittances, household development, Mexico, Latin America.

In Mexico, as elsewhere in Latin America and the Caribbean, global restructuring is ushering in new political economic relationships. The subsequent restructuring of regional economic landscapes creates different local, national, and international contexts, stimulating the movement of people and capital in processes Glick-Schiller, Basch, and Blanc-Szanton (1992, 1995) have depicted as “transnational.” As restructuring pressures intensify, Mexican families and households appear to be increasing their dependence on international migration to the United States as a survival strategy (Durand et al. 1996; Massey, Goldring, and Durand

1994). With more international migration and temporary circulation expected, remittances are likely to become critical resources for the sustenance of homes and families in rural and urban Mexico, Latin America, and the Caribbean (Conway 1994; Roberts 1994).

Our aims in this paper are to broaden explanation of remittance expenditures and to evaluate the positive contributions of remittances, return migrants, or circulating sojourners. Specifically focusing on the situation in “home” communities, we illustrate the multifaceted consequences of remittances and migration, emphasizing positive nonmonetary and social impacts. We see remittance investments as having a set of progressive effects that outweigh the negative aspects when people’s relations and interactions are examined at the microscale. We do not explicitly treat contextual forces, although macro-level factors

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do structure the individual and household behaviors we model (as Gardner (1981) and Wood (1981) persuasively argue). Our focus is on the microscale, where household negotiations, contestations, compromises, and decisions over investments are made. Previous commentary has dwelled on the negative aspects of return migration and remittances (Brana-Shute and Brana-Shute 1982; Reichart 1981, 1982; Rubenstein 1992; Weist 1979), but there is growing evidence that the positive aspects of "migradollar"¹ impacts in Mexico have been underestimated, or misrepresented (Durand, Parrado, and Massey 1996; Lozano-Ascencio 1993; Massey and Parrado 1994).

We believe there is justification for such a restatement of this important migration-development relation because both the system and people's adjustments have undergone revision and restructuring recently. Four dimensions characterize today's American globalizing system: (1) increasing diversity among regional and local economies, both in terms of return migrants' incorporation and in terms of wider fields of investment opportunities in diversified local economic bases; (2) the ever-evolving nature of international migration and circulation patterns and of interregional movement; (3) the evolution of transnational networks that tie immigrant communities and local "home" communities together in complex ways; and (4) the increasing significance of gendered migration relations and roles.

The remainder of the paper comprises several sections. First, there is a case to be made for reevaluating the contemporary consequences of migration and remittances for local communities in Mexico, Latin America, and the Caribbean. Scholarship is increasingly at odds over

whether the impacts of migration and remittances in rural transnational communities² are positive or negative, and whether they are progressive or destructive and dependence-deepening. Next, we present a "real-life" remittances investment model that conceptualizes a wide array of investments as progressive and satisfying.³ We include the changing scope of women's roles in transnational households—as migrants as well as "stay-at-homes"—in household social and economic relations. We draw specifically upon recent feminist scholarship to characterize women's household contexts, their relations with men, children, and other dependents, their negotiating power, and their remittance and savings investment strategies. We focus upon the potential range of recipient strategies of investment of remittances and the ways migration and circulation patterns are related to remittance impacts on the lives of individuals and households in rural communities in peripheral regions of the Americas: Mexico, Latin America, and the Caribbean.

Three source literatures inform this theory: gendered migration-development work (Folbre 1988, 1992; Hondagneu-Sotelo 1994; Pessar 1988; Katz 1991; and others); accounts of the importance of noneconomic and complementary or informal economic involvements in Latin American and Caribbean contexts (Conway

² "Transnational communities" are characterized by the incorporation of migration (and remittances) cultures into the very adaptive fabric of the social system, such that people live between two worlds: North America and "home" communities in Mexico, Latin America, and the Caribbean (see Grasmuck and Pessar 1991; Glick-Schiller, Basch, and Blanc-Szanton 1992; Smith 1992).

³ Wolpert (1964) argues that because of contextual constraints spatial decision-making behavior is frequently *boundedly rational*, or *satisficing*, and rarely utility maximizing and optimizing. This behavioral concept is also appropriate in our context.

¹ "Migradollars" is a colloquial term used by scholars and migrants alike to depict the transnational flows of U.S. currency that Mexican migrants send or bring back home (see Massey and Parrado 1994).

and Glesne 1986; Ekins and Max-Neef 1992; Grasmuck and Pessar 1991; Perez-Itriago and Guendelman 1989; Roberts 1994; Wheelock 1992; among others); and current "revisionist" work on migration and remittances, notably Russell's (1986) remittances system of intermediary effects and Massey, Goldring, and Durand's (1994) comparative analysis of 19 Mexican communities (also Durand et al. 1996; Massey and Parrado 1994).⁴

In the penultimate section, we draw upon an ethnographic examination of the sustenance strategies of individuals and households in a rural Zapotec community of south Mexico, Santa Ana del Valle, Oaxaca, to illustrate our ideas. This village-level inquiry demonstrates the dynamic nature of contemporary international migration and circulation processes in such a peripheral locale and the growing importance of their consequences: remittances, return migration impacts, and repetitive circulation outcomes. The conclusion reemphasizes why such reappraisals of contemporary migration-development relationships are needed.

Revisiting the Consequences of Migration and Remittances

Evaluations of the potential costs and benefits of remittances on the migrant-sending communities in Mexico bemoan the impacts. Drawing on numerous community studies, conventional wisdom holds

that remittances and migrants' savings are largely spent on current consumption—family maintenance and health, housing and consumer goods—with little left over for productive use (Reichart 1981, 1982; Rubenstein 1983, 1992; Weist 1984). Furthermore, a general consensus of Latin American and Caribbean regional scholarship is that return migrants are unsuccessful agents of change and rarely contribute to progressive transformations of their home societies (Bovenkerk 1981; Stinner, de Albuquerque, and Bryce-Laporte 1982; Weist 1979).

Consumption expenditure should not be so easily denigrated. Recent research on remittances effects in El Salvador found that the survival of many small businesses in San Salvador depends on the continued arrival of remittances (Lopez and Seligson 1991). Worrying about their countries' reliance on underground economies, emigré Guyanese and Haitians point to parallel situations in the Caribbean, where remittances of hard currency are essential for those remaining behind (Percy Hintzen, pers. comm., Havana, Cuba, 1991; René Aubourg, pers. comm., Bloomington, Indiana, 1994). In such situations of social crisis and widespread deprivation, spending remittances on basic necessities like food, fuel, clothing, and medicines cannot be easily dismissed as negative.

Previous research among poor households in St. Vincent found that remittances were merely one source of capital among several other unreliable means of acquiring income. Recipient women and aged dependents used remittances mainly to purchase basic necessities for themselves and their children. Recipients who were better off, with other reliable sources of local income and income-generating opportunities, benefited more from remittances. They either hoarded cash, began savings accounts, or invested their remittances in land purchase and/or development, even in small-scale enterprises and small farming operations (Conway and Glesne 1986). In Santa Ana, remittances range from trifling to substantial amounts.

⁴ Until recently, the most commonly held assessment of remittances was that they brought a host of negative influences to the recipients, they increased dependent relations, and they were obstacles to development and progress in Third World communities. Recent "revisionist" research by Massey, Goldring, and Durand (1994) and others (including the authors) finds fault with these "conventional wisdoms," which prematurely dismiss remittances' positive influences on the lives of rural people in Mexico, Latin America, and the Caribbean.

Some families receive an estimated U.S.\$300 a month (Cohen 1994). Recent investigations among the Miztec found that the overseas community in New York undertook a collective effort to remit the total amount necessary to finance the construction of a complete local sewer system in their community "back home" (Smith 1992).

Recent work on "migradollar" impacts in Mexico suggests that remittances' positive aspects have been underestimated or misrepresented. The current annual sum of U.S.-Mexico remittances is estimated to be about U.S.\$2 billion, and the flows of this enormous transfer of foreign capital have been relatively consistent through the 1980s (Durand, Parrado, and Massey 1996). Concentrating on the indirect regional economic impacts of remittances, Durand, Parrado, and Massey (1996) are convinced that "migradollar" consumer spending yields substantial and varied multiplier effects in a wide range of Mexican communities. Other related work by Massey, Goldring, and Durand (1994) has identified the determinants of migrant remittances, highlighting the importance of life-course transitions in remittances decision making and of community-level factors for determining migratory outcomes and consequences. Several distinctions explaining the variations in Mexican household experiences with remittance investments appear generalizable: the maturity of the migration stream; the degree to which productive resources and community-level economic conditions were favorable for investment, whether in agriculture, manufacturing, sales, or services; the geographic, political, and economic position of the community within Mexico; and the U.S. labor market niches where the communities' migrants first established their bridgehead and developed their labor-recruiting network (Durand and Massey 1992).

We propose a new conceptualization of the consequences of migration and remittances for local communities in Mexico and elsewhere in Latin America and the

Caribbean in this contemporary era, where noneconomic relations, gender relations, and complementary (informal) economy involvements are specifically highlighted and afforded their due recognition.

A "Real-Life" Remittances Investment Model

Recently, Russell (1986) presented a "remittances system of intermediary effects" depicting three sets of potential determining factors affecting the size and nature of remittance flows and the decision-making choices of the remitters. Macro-level contexts, currency exchange conditions, and demographic attributes were posited as intermediary influences on the decision to remit, the amount to remit, and the uses or investments of the cash and kind remitted.⁵ Russell's "remittances system" does not pay much attention to the range of recipient strategies in sending communities, however. Rather, the construct relies on the conventional categories of consumptive or productive investments as categorizations of recipient uses. Our conceptualization of recipient strategies broadens the analysis and specifically focuses on noneconomic returns in the progressive spheres of human and social capital (Fig. 1). In addition, the demographic characteristics of the recipients (households, family members, dependents) and the changing geographic and socioeconomic contexts of local and regional economies influence the distribution patterns of remittances investments and propensities for circulation, for return migration, or for emigration. Taking account of life-course influences on the short-term, goal-setting strategies of circulating migrants and their recipient dependents, we suggest remittance investments

⁵ Russell's (1986) article provides a fuller rationale for the direction of effects these sets of determinants and intermediate effects have on the flow and volumes of remittances.

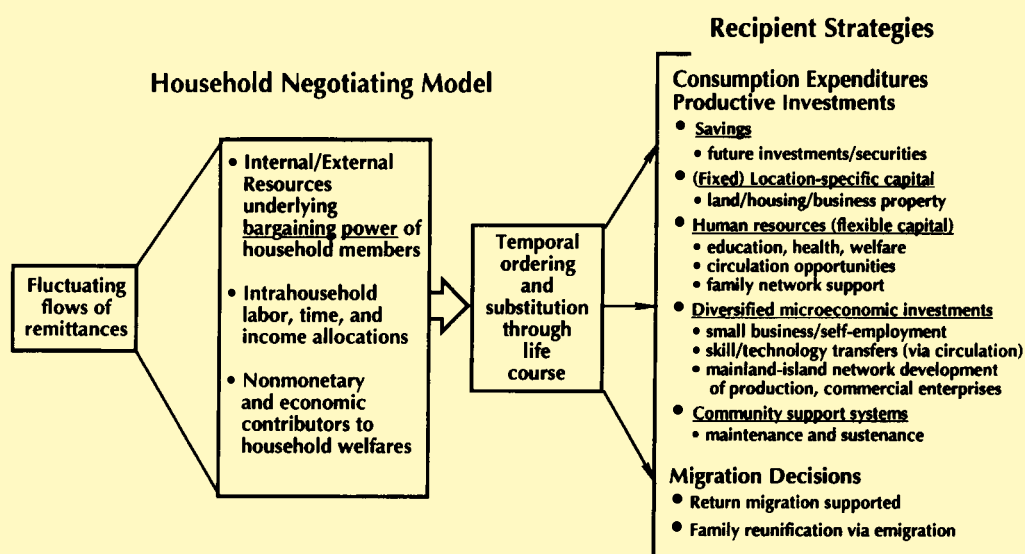


Figure 1. Remittance flows and household strategies.

will have a temporal ordering as priorities change with life-course transitions (Warnes 1992).

Further, our construct depicts remittance investments in the complementary (informal) sectors—the self-employed, irregular, and petty competitive sectors—and in the household social economy as fundamental private transfers of capital, progressive and satisficing (Ekins and Max-Neef 1992). Return migrants are conceptualized as people endowed with *cultural capital*,⁶ potential and realized, as well as economic human capital. Both remittances and returnees contribute to communal social and cultural knowledge (*social capital*),⁷ the entirety comprising a significant bundle of reinvestments (see Bourdieu 1986). We view these investments as significant resource endowments helping to sustain the rural poor of the hemisphere.

⁶ Anthropologists have coined the term cultural capital to represent the full complement of a people's cultural practices (see Bourdieu 1986). Migrants accumulate cultural capital from two sources: their home society and the cultural realm they are visiting or to which they are emigrating.

Differentiating between the formal economy and the complementary economy, Wheelock (1992) illustrates how the system of total economic activity, and families and households within it, is regulated. She emphasizes the central importance of the household (domestic) and voluntary sectors, both to human life and to the operation of the formal economy. We concur that the household social economy is fundamental, whereas "human societies have got along well without formal markets or states. . . none have without families and voluntary, productive structures of interpersonal relations" (Wheelock 1992, 123). More specifically, it is from the work on gender relations within households (Folbre 1988, 1992; Hondagneu-Sotelo 1994; Katz 1991; Perez-Itrago and Guendelman 1989; among others) that we construct a house-

⁷ A recent sociological perspective on Mexican migration distinguishes between the (economic) human capital resource bases of individuals and social capital as communal returns of cultural learning and socialization to social groupings, families, and kin networks (Massey 1997). We find the distinction extremely useful in our construct.

hold negotiating model to explain the complex variations in family income disbursement that are likely among rural Mexican households.

Following Katz (1991), and as an alternative to the widely used neoclassical "new home economics" models such as the household bargaining model (see Sen 1990), we rely upon a household negotiating model (HNM) in our investment construct. Our HNM has three major components: the internal and external resources underlying the bargaining power of all household members; the mutually interdependent, intrahousehold labor-, time-, and income-allocation processes; and household members' welfare reconceived to recognize the existence of multiple welfares in the same household (Fig. 1). Our conception of human social welfare goes beyond economic relations to incorporate the part of the nonmonetary household economy that includes production within the home: housework, child care, and emotional labor (Folbre 1992).

Women who stay at home, women who initially stay then follow their spouses on an international sojourn, and women who migrate and return either as tied-movers or independently all assume negotiating positions and bargaining rights over household relations, household resources, and decisions made on behalf of other household members. Also note that absent men empower women as well as estrange them (Hondagneu-Sotelo 1994). Remittance expenditures figure prominently in such negotiations and their conflicts. The household is the domain in which time and space budgeting and resource allocation and reallocation are contested, negotiated, and decided by men and women. Women, as recipients and the primary dispensers of remittances, take responsibility for their investment decisions, and women's management acumen appears to strengthen as time passes. We firmly believe that women's responsibility for the human welfare of their dependents is better cast in terms of household bargaining for nonmonetary returns (such as time-release, dependent

care, sharing household duties) than by reducing the explanation to fit within neoclassical, home economics calculations.

Recent work suggests that alterations in remittance investment patterns, which evolve through phases of "family maintenance" to a "business investment" phase, have a rational microeconomic basis (see Chevannes and Ricketts 1997; Guarnizo 1994; Massey and Parrado 1994). The evolution is not expected to be a necessary or linear succession. The different phases depict different investment priorities, and recipients may never become entrepreneurs. Some may progress through the succession of phases, but even for those who do not, the objective may be an important motivator for remitters and recipients. We specifically qualify this HNM decision-making model by adding the gendered perspective just summarized, concentrating particularly upon how such investment decisions are negotiated in relation to gendered power relations in household negotiating over noneconomic as well as economic returns (Fig. 1).

Remittances as Productive Investments

Let us now consider the various strategies open to Mexican recipients. Remittances, returning migrants and circulators with their pocket transfers,⁸ returnees with their enhanced human and cultural capital, and the household recipients with their enhanced social capital constitute transnational transfers at the appropriate scale (and scope) of investment effectiveness—the household level (Du-

⁸ Migration researchers refer to cash carried personally by couriers or by returnees as "pocket transfers," to differentiate such personal shipments of remittances from more regular shipments of money orders and cashiers checks mailed or electronically transferred using formal financial institutions. Pocket transfer amounts can be substantial (see Lozano-Ascencio 1993).

rand, Parrado, and Massey (1996) agree with us on this point). Here, we narrow the focus to conceptualize the behaviors of one group involved in household negotiating processes, the recipients of remittances in local rural communities in Mexico (and potentially in Latin America and the Caribbean as well).

As purposeful decision makers, the recipients of remittances and of gifts and in-kind transfers of goods from overseas sojourners make choices among investing in productive activities, saving for future investment opportunities, or spending on immediate necessities. Their choice(s) are influenced by the migrant or circulating donor to varying degrees, with household negotiating dependent upon the strength and nature of the family and structured by obligatory relationships (Philpott 1973). Decisions at odds with the expressed wishes of the overseas donor are to be expected, and how remittances are used will be influenced by the circulating and migration behaviors of the donors. Long absences might contribute to a growth of independence by the recipient, while shorter-term sojourns should reinforce the strength of the donor's influence on remittances expenditures and investment decision making.

The donor's need to be certain of the implementation of his or her investment wishes will in turn affect return intentions. Communal and familial mores also influence remittances investment. The heightened status acquired through the symbolic demonstration of affluence—redistribution of wealth via gifts, "throwing large parties," donating extravagantly to community projects, to the church, to relatives—also influences remittances dispensation. Such externally created relative affluence might be beneficial to recipient families if it secures their place in their community. It only becomes a source of disruption and social tension when the mores of civil society are severely compromised (see Greenberg 1995).

Remittances investments are likely to change over the life course as priorities

change (Warnes 1992). Young people with few family responsibilities will place priority on using remittance investments to build a cache to afford to marry, pay for festival expenses, have good times, or to finance another sojourn. Among married migrants, priorities are saving to buy land and a house and investing in children's expenses, especially education investments. As the circulating migrant matures through his or her life course, he or she may very well undertake more transnational circulations to accumulate skills. With maturation, he or she begins saving to invest in small business ventures, or diverts investments to support maturing dependents, such as financing the migration of male prodigy to acquire higher education.

Also, household decisions on mobility and negotiations over disbursements of resources (including remittances) are conducted within family networks, which are themselves shaped within broader community networks. Individuals undertake long-duration migrations or shorter circulations depending upon the objective(s) of the sojourn. Some might replace others, a strategy Lomnitz (1977) has characterized as "relay migration." Others may join or rejoin other family members, with obligations to continue support of the household. Even the long-absent migrant does not always sever his or her connections with "home." Repeated circulations may become a life-course strategy, where the success of previous sojourns fuels another. Remittances and pocket transfers are likely to become institutionalized aspects of the household resource bundle, relied upon in times of severe need and potentially available when additional needs warrant.

Especially in this latest global restructuring, opportunities abroad, redeployment of household members' roles and contributions, and remittances investments have come to be major strategies to guard against uncertainty for the migrant donor(s) and household and family recipients alike. One further qualification needs emphasis, however, lest remittances and migration come to be characterized solely

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as structurally induced responses of the powerless and disenfranchised. We conceptualize household negotiating, family-network development, people's mobility, remittances, and recipient investments as self-determined and relatively autonomous "resistance" actions of people attempting to survive in a crisis-ridden structure of dependent capitalist relationships, with all their accompanying hostility and destructive potential (Bach and Schraml 1982; Conway 1988). Such purposive action even by those with little space to manoeuvre is empowering. Vulnerable they may remain, but not totally bereft of options (see Watts and Bohle 1993).

Productive Strategies of Remittance Investments

As depicted in our modified remittances system (Fig. 1), the range of productive investment portfolios can be summarized under five categories: (1) savings strategies; (2) (fixed) location-specific capital ventures; (3) (flexible) human capital resource investments; (4) diversified microeconomic investments; and (5) community support, maintenance and sustenance, and "social capital" realizations. These are discussed below.

Remittances are often spent immediately to meet the basic needs of recipient families. In St. Vincent, however, small and irregular remittances tend to be added to other *savings*, with the accumulated amount eventually being spent on home improvements, building materials and the like (Conway and Glesne 1986). Among Santa Ana migrants, young males circulate in order to accumulate savings for marriage purposes. More importantly, pocket transfers of returning migrant heads repatriate savings accumulated while away, and these are likely to be transferred to a savings account when home, to serve as a basis for future investment and interest accumulation. Massey and Parrado (1994) estimated that among their large sample of Mexican returnees pocket transfers converted to

savings were in smaller amounts than accumulated amounts of regular cash transfers of remittances. They also found that returnees had a tendency to spend their savings on what they referred to as "productive ends": 17 percent of savings versus only 3.7 percent of remittances were spent on productive pursuits (Massey and Parrado 1994). Saving for future investment does not appear to divert a major proportion of remittances received. Rather, saved accumulations appear to be spent relatively quickly.

Investments in *fixed, location-specific capital* are expected to influence return migration propensities in two ways. First, it serves to tie the migrant to the source community, with the propensity to return being proportional to the location-specific capital invested. Second, the propensity to return varies with the length of absence, because the location-specific capital depreciates in value. This second effect might not occur, however, if migrants intended to return and conscientiously rekindled their location-specific capital stock via frequent visits, retaining ownership of property, initiating a small business, diversifying their reinvestment strategies, and generally reinforcing their ties with the home community (DaVanzo 1981).

In our portfolio of recipient strategies, the notions of "fixed capital" stocks such as land, housing, and business property are contrasted with "flexible human capital,"⁹ inherent in people (see below). Remittances when eventually invested in land acquisition or property improvement will likely have been accruing in savings

⁹ We agree with Carnegie (1982), among others, that endowing mobile people with human and social capital enables them to utilize both their mobility and their endowments in creative and flexible ways, so that they are better able to counter, or adjust to, the vicissitudes of their impoverished existences, their limited life-chances, and their opportunities. By contrast, investments in land and housing are subject to structural contexts, are subject to factors outside the poor's control, and are immobile.

accounts, and it is unlikely that such savings accumulations are derived solely from overseas sources. The resultant constant flow of modest remittances might gradually add to the savings account to the point that a "fixed" capital investment can be undertaken. Circulators invest their human capital in "fixed capital" through construction efforts, home improvements, utilities upgrades, and the like. Symbolically, such fixed-capital investment reaffirms the return commitment of the overseas sojourner(s), while serving to satisfy place-utility aspirations of the recipient(s) at home.

Retirement home construction, self-building of homes, family-land maintenance, house and land improvements, investments in water, sewerage, and electricity services, even elaborate and ornate construction of modern residences, are fixed location-specific capital ventures that strengthen return propensities. Research on urban and suburban return migrants' investment strategies in Barbados defended the rationality of home purchasing prior to return (Gmelch 1987). Among Mexican and other Caribbean communities, remittance investments in fixed capital stock and housing upgrading is noted but is invariably characterized as unproductive, or consumptive (Grasmuck and Pessar 1991; Stinner, de Albuquerque, and Bryce-Laporte 1982; Reichart 1982). On the other hand, Ishmael (1988) found that among the urban poor in Dominica and St. Vincent who resorted to self-help housing strategies to acquire shelter remittances scarcely figured as sources of revenue for their house building and property improvements. Rather, local sources, loans from formal and informal sources, and sweat-equity exchanges helped finance and construct shelter for these underprivileged urban householders.

Spending remittances on children's health, education, and welfare is productive investment. Investments in such *flexible human capital* stock—in youth, the innovative, and the creative—is progressive, because such incremental effects

endow human energies, expand human capabilities, and develop human flexibilities. Remittances invested to maintain and develop family linkages, to widen transnational networks, and to facilitate family network relationships might also be considered adaptive and "flexible" productive responses. Maintaining ties to overseas family and kin and strengthening links between urban-based kin and their rural-resident "stem" family are coming to be necessary accommodations to the vagaries of Latin American and Caribbean subsistence livelihood chances at "home" (Roberts 1994). We also insert the notion of circulation (temporary sojourning away from home) as another means for enhancing the human resource potential of Mexican, Latin American, and Caribbean people, whereby remittances are, or can be, productively spent. Skills gained from overseas experience may or may not be immediately translated into productive capabilities at home in local economies, however, because the opportunities available at home might very well be limited (Conway 1988).

Returnees are not only endowed with new technical proficiencies, they still possess considerable local knowledge, education, and expertise. For example, the recent flourishing of local nongovernmental organizations in some Caribbean islands and their efforts to undertake progressive and successful conservation and environmentally sensitive initiatives are prompted by the active involvement of young professionally trained returnees (Conway and Lorah 1995). In Santa Ana, the current mayor's experience gained from his laboring in the United States was one instrumental factor that helped guide and determine the design and construction of local roads and infrastructure (Cohen 1994).

Capital, skill, and technology transfers via international circulation are likely to assist in the incubation and establishment of new *microeconomic* enterprises within and outside the household. In a recent project, Portes and Guarnizo (1991) found dynamic relationships between the New

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York-based Dominican community business sector and those thriving in the small business sector in Santo Domingo (see also Smith 1992). Such bilateral support included skills acquisition, capitalization initiatives, and acquisition of production inputs. In Jamaica, Chevannes and Ricketts (1997) found similar investment dynamism in the incubation of tourism-related ventures. Both in the formal and complementary economic sectors of "home" communities, such investments have the potential to diversify the small business mix and build transnational ventures. Whether such investments in Santa Ana, or in other small communities in rural Mexico, will result in the projects evolving through logical phases of "family maintenance" to "business investment," as Portes and Guarnizo (1991) found in the Dominican Republic, is difficult to predict because of the widely differing contexts.

Whereas the other forms of investment focus on individual or household decision making and assume autarkic relations, *community support and social capital realizations* assume a collective identity. They involve investments to endow communities with increased social (and cultural) capital. The emergence of "transnational" network-reinforcing communities—one abroad, the other the home base—involves the circulatory flow of remittances and people. Remittances commitments to local community endeavors can explicitly demonstrate the community support of overseas members. Demonstrations of the success of those temporarily absent can be managed easily via remittance transfers or the showering of gifts, presents, and fashionable commodities. There is growing evidence that local community systems are receiving valuable and essential inputs of remittances and goods in kind—either as more and more families become significant recipients, or as overseas community organizations actively become participants and investors in local community development and infrastructure improvement projects (Hulshof 1991; Smith 1992).

Remittances influence future migration decisions, for both the sojourner or migrant and the members of the recipient household: in essence, future mobility is fostered by the "*reproduction of remittances*." Shorter-term, repetitive circulations are likely to reinforce other family members' propensities to move, the repetitive "*demonstration effect*" being influential in this regard. Equally common, return migration is supported, and the return intention of the remitter realized, in part owing to the "success" of the remittance investment strategies. Mexican, Latin American, and Caribbean communities have social histories where migration traditions are bolstered by the folklore of the success of many returning "prodigal sons and daughters." Nowadays, return migration is viewed in more positive terms, rarely as detrimental to the societal good. Success of the "tropical capitalist" ventures Portes and Guarnizo (1991) depict fuels circulation, and stays movement. These opposing tendencies should be expected.

On the other hand, successful remittance investments can also foster additional migration. Wife and family reunifications occur, with the recipient householders eventually joining the remitter and effecting an emigration of the entire unit. Remittances spent on children's emigration might initiate their estrangement and foster a dislocation that becomes permanent. Long-term absences might be justified to satisfy the continuous need for remittance investments. But unless social and familial obligations prevail, returns to the household and those left behind might not be realized if the donor abrogates his or her responsibilities and separates, divorces, or merely stops payments.

Santa Ana del Valle, Mexico: A Transnational Community

One of the authors (Cohen) conducted ethnographic research from June of 1992 to June of 1993 and over the summer of 1996 in Santa Ana del Valle, Oaxaca,

Mexico (Fig. 2).¹⁰ Santa Ana is a typical rural peasant community, located away from centers of production and power, yet intimately linked to national and transnational spheres. Santa Ana's history as a craft-producing village where wool textiles are made places Santañeros increasingly into Mexico's booming tourist industry. Additionally, increases in tourism, the expansion of educational opportunities locally (with the construction of new schools and growing access to area high schools, technical schools, and universities), improved media access, and the presence of more consumer goods in local markets, lead to what Alarcon (1992) calls "*norteñización*"—increasing links between the community and external markets, culture, fashion, and tastes. And, this self-reinforcing process (Massey, Goldring, and Durand 1994) brings cash, goods, and new expectations to villagers. With little opportunity in the village for expansion of livelihood options, Santañeros are turning more and more to wider markets to make a living.

One alternative is wage labor in nearby towns. Some Santañeros commute daily to Oaxaca City for work. Young girls are often

¹⁰ Standard ethnographic methods were employed, combining participant observation, interviews with key respondents and others. Also, a survey was conducted with 50 randomly selected households in 1993 and followed up in 1996. Community-level census data from 1993 and 1996 were collected locally and at city offices of INEGI (Instituto Nacional de Estadística, Geografía y Informática). Household surveys combined open-ended and controlled questions. Questions were posed around the subjects of education, family lifestyle and structures, employment strategies, income accumulation, saving and consumption patterns, goods and property bundles owned, migration experience, and participation in communal and reciprocal relationships. These relationships include *guelaguetza* (reciprocal gift and service exchanges), *tequio* (communal labor), *servicio* (community service), and *cooperación* (giving of funds to community projects), among others.

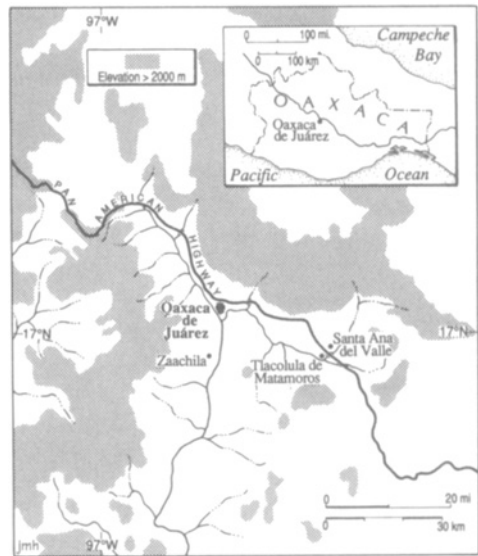


Figure 2. Santa Ana del Valle, Oaxaca, Mexico.

employed as domestics in Tlaxiaco (an important market town 4 kilometers south of Santa Ana), and men take part-time temporary jobs in car repair shops, construction, and agriculture outside the village. Local jobs, however, are difficult to find and bring scant returns. In 1992, the daily wage in Oaxaca was only 15,000 pesos (converted on 1 January 1993 to 15 nuevos pesos), or U.S.\$5.00. In 1996, the minimum wage had increased, but only to 30 pesos, barely keeping pace with inflation. In Santa Ana, many workers were still earning 15 pesos a day on average for their efforts as weavers or as hired help. Given these comparative wage levels, the growing attractiveness of unauthorized immigration into the United States is scarcely surprising.

Migration and Transnational Transfers

Migration has been a livelihood option in Santa Ana for decades. Older informants recall parents working on plantations in Chiapas and traveling as far as Mexico City. Other Santañeros joined the ranks of

"*braceros*," finding work on contract in the United States.¹¹ However, it was during and following the protracted economic crisis of the mid-1980s that migration grew as a widely used survival and sustenance strategy for members of this Zapotec community.¹² U.S.-bound transmigration became the Santañero strategy of choice for earning cash for fiestas, house construction, investments, or, as villagers describe the situation, "to advance themselves" in response to the continued decline in wages and the ongoing crisis in Mexico's economy. Migration follows two primary patterns in Santa Ana, long-term and cyclical (short-term). Long-term migration takes a Santañero away from the village for 10 to 20 years. In some cases there is no return. Four families from Santa Ana have settled in Tapachula, Chiapas, where they work as bakers. More typically, Santañeros follow a short-term, cyclical, and repetitive movement pattern (also see Hulshof 1991). Santañeros circulate back and forth from their community to destinations both near and far afield for periods averaging approximately two years. Circulators from Santa Ana go to Mexico City and Southern California, including San Diego and Santa Monica.

¹¹ The Bracero program, or the Emergency Farm Labor Program, brought Mexicans into the United States as visiting workers on contract from 1942 through 1964. The program was ended because of organized labor's complaints of wage depression and the ill treatment of workers (Cockcroft 1983).

¹² *La Crisis* (the Mexican national economic crisis and resultant Structural Adjustment Program) saw the collapse of the peso and a drop in the minimum wage of nearly 40 percent between 1980 and 1990. For the decade, the inflation rate averaged nearly 90 percent, and in 1980, the worst year on record, it topped 159 percent ("Free Trader's Virtue" 1993).

Household Negotiating: Circulation, Networks, Individual Obligations

Santañeros migrate for a number of reasons, but most are associated with improving family or household livelihoods. However, the decision for someone to seek work in the United States is typically made by the household, which in Santa Ana generally takes the form of a nuclear family. There are times when the Santañero family functions like an extended unit: when unmarried adult children remain at home with their parents, or when young couples remain in the household of a parent until they are able to afford a separate home. Many family-households continue to live near each other even after they are independent nuclear units, often sharing a common patio or adjoining home sites. Importantly, kinship and reciprocal networks are used at home and abroad. Especially in the United States, many current migrants from Santa Ana live with relatives or friends. Such patterns lower the risks and costs associated with migration while increasing security and a sense of well-being through familiarity (also see Lomnitz 1977). Additionally, the non-kin relationships migrants have with others in (and outside)¹³ the community can be as important as household ties or obligations—the social and communal networks are highly interconnected and mutually reinforcing. In the Caribbean context, Carnegie (1982) has coined the term "strategic flexibility" to characterize this form of social adaptability of marginalized, yet innovative young people.

Many times, the decision to migrate is tied to the life course of the household

¹³ Lasting friendships with other Zapotecs and *mestizos* are forged during the trips north as the common purpose of crossing the U.S.-Mexican border establishes personal bonds and crisis-support relationships. These can become significant extensions of local community networks in the transnational circuits.

(Warnes 1992). The needs of the entire family take precedence over individual objectives (under conditions of negotiation). For example, a young man's first migration is often made to accumulate savings in anticipation of the celebration of his wedding. A common pattern is for a young man and woman to declare themselves married according to common law; this usually entails living together in the home of one of their parents. During pregnancy or following the birth of a child, the man will prepare to leave for the United States. Once in the United States, he will stay with a brother or cousin and begin saving money for a formal wedding. Upon returning to the village, the young man will often serve the first of his many positions in the community's political hierarchy. Following the wedding, the groom and possibly the bride as well return to the United States to work to save for their house, to cover the social and economic debts they have acquired, and to save for the support and education of children.

Every Santañero is asked to give service (*servicio*) from time to time in the local government/*cargo* system of the village. Indeed, the remittances of migrants allow such "benevolent" Santañeros to take a more active role in the governance and development of the community. For example, the village president from 1991 to 1993 was able to work nearly full time because of the financial support of his son who was working in the United States (totaling nearly \$300.00 a month). With more time, the president and his associates were able to plan for and manage development projects, including the construction of a new school, expansion of a water system for the village, and the refurbishment of the central plaza. Often, periods of migration follow particularly expensive and time-consuming committee positions where a family's cash surplus is used.¹⁴

¹⁴ Like most rural peasant communities in Mexico, Santa Ana has a vibrant and large political-cum-religious hierarchy, or *cargo* system.

Usually, heads of household will return for a second and third (or more) round of transmigration following the completion of community service. The job they hold in the United States (typically a dishwasher in an Asian cuisine restaurant) often becomes the "property" of a family or network of cousins. As individuals cycle into the overseas migrant community, they spend time at this transnational job. Migrants come to depend on one another, in reciprocal relationships that closely approximate those found in their Zapotec community in Mexico. Hirabayashi (1993) calls these associations *paizanazgo* and argues that they are a structure through which practical knowledge and experience rooted in the natal society and *compadrazgo* (godparenthood) is adapted to the new social situation—in this case a transnational Zapotec community located in both Santa Ana del Valle and the United States.

Savings, Fixed and Flexible Capital Transfers

Because migration is difficult, stressful, and sometimes dangerous, many Santañeros hope to accomplish more than simply meet basic needs and expenses through their sojourns. Remittances, even when small, are hoarded and saved, often in bank

While there is the expectation that *cargo* systems will collapse under the pressure of migration and the demands of growing national bureaucracies, Santa Ana's situation suggests that the *cargo* system can be rearticulated to meet the demands of new political and social realities. In Santa Ana approximately 20 committees manage the majority of the village's political and religious needs. Committees typically serve for one to three year terms and usually are filled by seven members. One issue that has come to light from the surveys in 1996 is the change in contests over prestigious *cargo* positions. There is some indication that the more an individual migrates the less likely it is that he or she will fill high-status positions. Instead, the migrant may be asked to fill costly but lower-status positions in one of the growing number of *cargos* that the state and federal governments have asked the village to form.

accounts, and not just hidden in the house. The motive most often noted by return migrants in the 1996 survey was family maintenance. However, maintenance was not defined simply as covering the daily needs of the family (food, clothing, medicine, and so forth). Rather, the accumulated remittances were earmarked for house improvements (important in a community where dirt floors are normal and few modern kitchens are present), then education, kin and community relationships, and business start-ups. Again, investment strategies of a given family depended upon their life-course situations. Younger families dedicated more funds for subsistence needs and house improvements. Settled families with young adult children who could work as weavers or local wage workers invested more funds in business and education.

Diversified, Microeconomic Investments

Given their changing circumstances and continuing vulnerability, some Santañeros are trying to start local businesses. Between 1993 and 1996, a number of businesses were opened in the village: at least three new stores, two restaurant/cafes, two barbershops, and, in response to the home building boom begun in the late 1980s, a glass shop, two door shops, and at least three local contractors. By 1996, there were four phone lines in the community, whereas in 1992 there were none. Other developments include a continued growth in local arts programs, the construction of a two-storied *Casa del Pueblo* (archive, library, and performing arts center), and a new health center, staffed every day and funded by the state.

Many of these ventures remain labor intensive (the expansion of family-based craft production, for example) and were built through the exploitation of household labor power. Furthermore, their success is not measured in rates of return on investments; rather, it is calculated in terms of sales. Profit margins are often slim, and capital, rather than being invested, is sim-

ply replaced. Although it has doubled in population size in the last 20 years, Santa Ana remains a small village market economy with little infrastructure, few local businesses, and even fewer employment opportunities. These remittance-sponsored businesses may be more important as forerunners, or incubators, of a future expansion and diversification of the village economy than as definitive local economic successes in their own right.

Community Support and Social Capital Realizations

Many of the aforementioned microeconomic enterprises and "fixed capital" investments build upon and reinforce local, reciprocal social and cultural ties among Santañeros, as much as they represent monetary entrepreneurialism (also see Greenberg 1995). Like the Mastiche (Miztec) community described by Smith (1992), Santañeros are investing in their village infrastructure. In 1996, nearly 800 adult members of the community contributed an average of 550 pesos each (or nearly U.S.\$100) in support of village projects. The money collected is matched peso for peso by the state. The village also provides much of the labor for each project. Santañero workers are paid subminimum wage, but in exchange for their work each earns credit toward community service. Money is currently earmarked for five projects: reforestation of local land, construction of a freshwater reservoir, expansion of the community's electrical grid, construction of a communitywide drainage and sewer system, and repavement of local roads.

Much of the money funding these projects is earned in the United States and comes to the community as remittances. In an interesting turn of events, Santa Ana has had to go outside of the community in search of workers to fill jobs on the reservoir and drainage project, since there are not enough working-age adult men to fill all positions. As Durand, Parrado, and Massey (1996) point out, the multiplying effect of using such migration remittances

can stimulate local economies. Spending on home building, consumer goods, meals at one of Santa Ana's two new restaurants, and infrastructural projects increase demand for Mexican-made goods and services and lead to higher employment and incomes. Working in a similar community in Michóacan, Adelman, Taylor, and Vogel (1988) estimate that each migrant dollar raised local incomes by U.S.\$1.78 and increased output by U.S.\$1.88.

"Reproduction" of Remittances—Fostering Mobility

Both cyclical and long-term migration strategies are practiced by Santañeros, but the trajectories differ markedly. For the long-term migrant, securing their migration status is an important concern. For this reason many long-term migrants endeavor to become legal aliens in the United States, sometimes marrying a legal alien and "green card" holder in the process. Among today's villagers, most families have at least one member or close relative involved in a long-term migration situation. Males predominate among this absent group of long-term sojourners. Often one or two "respectable" long-term migrants act as resource persons of stature and responsibility in the overseas migrant community. Their homes are often where short-term circulators will go for temporary accommodation and their job search in the United States.

Although long-term migrants might leave the village for periods of up to ten years without returning, most maintain connections with their home family and their community through organizations in receiving communities.¹⁵ Male Santañeros

who are away from home continue to support their families, sending remittances to cover school expenses, household improvements, and paying individuals to cover the costs of community service, including committee positions, communal labor, and *cooperación* (a form of community tax paid throughout the year to support work projects and festivals). Of course, remittances are not the same as real participation, and the stress that long-term migration places on the household is evident in marital strife, familial conflicts, and constant discussion of the issue of migration in local government.

A growing trend in the community, and one that signals the consolidation of migration and its cumulative effect (see Massey, Goldring, and Durand 1994), is the movement of entire families to the United States. As migration becomes commonplace in a community, the risks and costs of movement diminish. In Santa Ana, migration traditions are so entrenched that it is no longer a risky undertaking open only to those villagers with resources to afford movement or those most desperate for change. Rather, migration and circulation are common strategies to consider and undertake, centered as they are upon social networks, developed out of kinship ties, and rooted in traditions of accomplishment and "success." It is a rite of passage for young men, a way to finance household expenses for young families, and for older villagers a way to cover the costs of festival and political expenses.

Pros and Cons

Is migration positive or negative for Santa Ana? Certainly it causes problems. Some children may never see their fathers. Some wives are left to cover a household's entire expenses. On the other hand, women are gaining economic independence as they become primary breadwinners for families whose male members are

¹⁵ Long-term single migrants tend to be younger men who have left the village before marriage and children. Many informants have children who follow this pattern. While this does lead to "brain drain," it also takes those individuals who no longer want to participate in the social life of the community away and thus reduces the stress and conflict that surrounds

the reproduction of local models of practice and morality.

absent. Women are also the decision makers for remittance investment, negotiating with an absent spouse, while supported by their matrilinear family and others sympathetic to their situation. As more Santañeros migrate, women may also become important in the structure and maintenance of local government. Villagers are also gaining important experience working outside their community. The best example of this is in the development of a water and sewer system for the community. Initiative for the project grew out of the experience of migrants in the United States. Funding is also coming primarily from the remittances migrants send home to the community. Migration is problematic, but a necessary evil, perhaps. The "stay-at-homes" in Santa Ana are still vulnerable, the separated households are positively and negatively affected, and remittances are not fundamentally revitalizing the local economy. However, the nonmonetary returns to remittances appear considerable for the many Santañeros households incorporated into the Mexico-U.S. circuits of migration and circulation.

Conclusions

In this paper, we have focused attention on remittance consequences for local people in Mexico, Latin America, and the Caribbean at the individual and household level. Remittance recipient strategies are conceptualized as one set of decisions made in a multilocal and dynamic "open system" of inputs, through-puts, outputs, and of fluctuating enlargements and contractions in response to contextual and structural conditions. These remittances are influential in the lives of women and men, children and the aged. There is a broad portfolio of investment strategies to consider, as our construct depicts (Fig. 1). Women and men negotiate their decision-making authority within the household; they agree, disagree, agree to disagree, compromise, arrive at consensus, decide on behalf of the other. But the recipients primarily undertake responsibility for deci-

sions about remittances and savings accumulations and investment strategies. And they spend the money, take responsibility for altering expenditures, and justify or rationalize their decisions if called upon. The absence of the remitter essentially structures the negotiating context, as does the circulation and return visiting. Commonly, the women left behind—the spouse, her mother, aunt, sister, perhaps other female relatives in a matriarchal support system—make the majority of remittance investment decisions. Investments are made on behalf of dependent children, less commonly on dependent elderly, except perhaps when life-threatening health concerns need to be addressed.

Investments are made in noneconomic and economic realms, and throughout the life-course investment strategies will change, as priorities change, as negotiating powers shift, and as new or different decision-making contexts restructure the options and ensuing realizations. Household social economies constitute the space in which remittances are invested and progressively utilized. Recent work by Massey, Durand, and others has convincingly demonstrated the significant size of the local and regional economic contributions of "migradollars" to the Mexican economy.

The following anecdote illustrates how widespread and important remittances have become, not only for Mexico but for the United States as well. Martin (1996) reports that Mexicans may remit between U.S.\$4 to \$6 billion per year, much of it transferred through the electronic services of Denver-based First Data Corp., which owns Western Union and Moneygram. Despite high transfer fees, Mexicans now appear to be using automatic teller machines in preference to other means, such as pocket transfers, cashiers checks, and money orders. In competition, the U.S. Postal Service launched a *Dinero Seguro* service in August 1996, which permits the transfer of up to U.S.\$3,000 from any U.S. Post Office to any branch of Mexico's Bancômer Bank. These private

sector initiatives clearly recognize the volume of U.S.-Mexico transactions and signify their importance, now and in the future.

The consequences of remittances for productive enterprise in Mexico, as elsewhere in Latin American and Caribbean local communities, appear to be important, significantly diverse, but nevertheless progressive and supportive. We have identified a broader portfolio than has previous commentary, countering the dichotomous distinctions between "consumptive" and "productive" alternatives, which previous analysts used either disparagingly or uncritically. A fuller, more complete range of consequential productive investments awaits a more comprehensive inventory than was possible using our Mexican, Santa Ana community. Other contributions in this issue of *Economic Geography* do, however, lend our construct some welcome support.

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