

# The Emigration-Region Concept, Emergence Mechanism and Characteristics: A Case Study of the Opolskie Voivodeship

Krystian Heffner\* , Brygida Solga\* 

*This paper presents the concept of the emigration region that emerged as a result of wide research identifying the causes of emigration and migration networks, as well as the demographic and socio-economic consequences of significant emigration for particular regions. It is an overview based on long-standing research by the authors and draws heavily on numerous contributions that address the links between regional development and long-term migration outflow. The hypothesis is that an emigration region is formed under the influence of long-term and mass emigration resulting in progressive depopulation and characterised by a set of economic, social and cultural features clearly distinguishing it from regions where such a pattern of relationships is either missing or incidental. Identified features of emigration regions include a well-established tradition of emigration, the long-term nature of emigration, a significant quantitative dimension of emigration, well-developed networks of social relationships between the countries of outflow and inflow, the complex socio-political and economic reasons for emigration and the specific consequences of it, observed both at the individual (micro) level and at the level of local and regional communities (the meso level). The concept of an emigration region is illustrated by the example of the Opolskie Voivodeship (Poland, a NUTS-2 region). The concept of an emigration region emerged as a result of many years of research by the authors, implemented mainly in the Opolskie Voivodeship. The research methods were diverse (including quantitative and qualitative social research) and the research was conducted among the entities involved to varying degrees in broadly understood migration processes (emigrants, re-emigrants, regional and local governments, entrepreneurs).*

*Keywords: migration outflow, emigration region, regional development*

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## Introduction

The formation of transnational migration spaces under the influence of geographical, cultural, social, economic and political determinants is one of the features of contemporary international migration (Faist 2000; Pries 1999). In Europe, such spaces emerged between France and the Maghreb countries and between Germany and Turkey. However, mass emigration from Mexico to the United States is an area where the formation of such a space is the most apparent (Cornelius 2018; Faist 1993; Zong and Batalova 2018). There is no doubt that this situation leads to specific social and economic processes in both the emigration and the immigration regions. Until now, the scientific discourse regarding population flows between such areas has focused more on the issue of immigration (Borjas 1990; Chiswick and Miller 2009; Docquier and Marfouk 2006; Jasso and Rosenzweig 1995; Mattoo, Neagua and Özden 2008; Tienda and Raijman 2004).

Focusing more on the consequences of migration for the regions of immigrants' places of origin was associated with the phenomenon of human-capital flight and the increasing scale of movement from areas of excess workforce and low wages to regions where labour resources are insufficient and wages are relatively high (Passaris 1989). Development policy has also been increasingly linked to emigration (de Haas 2007a; Naerssen, Spaan and Zoomers 2008; Pries 2006; Skeldon 1997). Mediterranean countries in which migrants proved to be an element of the political, social, economic and cultural changes are a convincing reflection of these observations (Bratti and Conti 2017). Nowadays it is often shown that emigration has a positive impact in the emigrants' regions of origin (due, *inter alia*, to financial transfers, social remittances and know-how) as well as the measurable benefits of return migration (Fihel and Kaczmarczyk 2009; García 2018; Glytsos 2002; Kapur and McHale 2012; King, Strachan and Mortimer 1986; Levitt 1998; Levitt and Lamba-Nieves 2010; Lewis 1986; Taylor 1999). The question of social remittances and their significance for the development of regions with significant migration outflows has been noted and discussed in the Polish migration literature (i.e., White and Grabowska 2019).

The findings from the analysis of the causes and consequences of emigration in regions characterised by a significant, long-term outflow of population – and the results of many years of the authors' research in this field – have become the starting point for the development of the concept of an 'emigration region'. The paper presents its basic elements, i.e., the definition of the emigration region, the mechanism of its origin and the distinctive features of such an area. Among the identified features of an emigration region are a large-scale and permanent dimension of emigration, complex conditions and long traditions of emigration, a wide network of migration relationships, emigrants' contacts with the region of origin (circular migration movements and sentimental tourism) and emigration as an important determinant in the regional development.

The presentation of the concept of the emigration region was preceded by an analysis of both migration theories and theories of regional development in terms of their application when explaining the phenomenon of mobility in the emigration region. This review showed that both the theoretical achievements of regional development and migration theories contain specific elements applicable to the concept of an emigration region – e.g., the theory of migration networks from the perspective of achievements regarding migration issues and the theory of cumulative causes from that of regional development. At the same time, the overview of migration theories and theories of regional development allowed us to identify those referring the most to migration processes in regions characterised by significant population outflow and depopulation. Thus, they can be perceived as a theoretical basis for the concept of an emigration region in two ways: as a process of formation of such a region and of identification of its characteristic features. In the existing, vast theoretical output there is a shortage of theoretical approaches which would directly address this issue. For this reason, an attempt has been made to formulate the concept of an emigration region. As the analysis of the relationship between migration outflow and the region's development is based mainly on Poland's experience (especially the

Opolskie Voivodeship), the conclusions were formulated as a concept rather than a comprehensive theory. However, it was assumed that the article can become a good starting point for further scientific discussion expanding the understanding of the emigration region and situating it in the current range of theories identifying factors initiating permanent migration processes at different scales.

Basing the empirical part of the article on the authors' long-term research can be justified by the main goal, which is to present the concept of an emigration region. Indeed, it is assumed that the proposal of such a concept cannot and should not be the result of a single empirical study but, rather, the result of many in-depth analyses – both quantitative and qualitative. The article is therefore based on a holistic methodological approach, the results of which are presented in the conclusion part. At the same time, the analysis of the migration we conducted allows us to assume that the concept of an emigration region may be universal and relate to the regions whose demographic, social and economic development is determined by long-term foreign migration.

The choice of the Opolskie Voivodeship for the analysis of the concept of an emigration region is determined by the long-term nature of migration processes – dating back to the second half of the 19th century and intensifying after the end of World War II – and in a decade of the 1980s and 1990s. Ethnic determinants and the related departures of people of German origin, as well as the possibility of working legally in Germany and other European Union countries long before Poland's accession to the European Union, were a specific feature of the migrations of that period. Due to the large scale of emigration and the durability of this process, the Opole region is an area where the consequences of migration are the most noticeable, both economically and socially. Counteracting the negative effects of this process and minimising their scale has also become one of the key challenges for the development of this region.

### **Theory review: theories of migration and of regional development versus the concept of the emigration region**

Theories of regional development refer to migration as an important determinant of territorial changes, whereas migration models refer to regional aspects. However, in the theoretical achievements of regional development, migration is a much more important analytical category than migration theories explaining regional development. In the latter, the diversified level of socio-economic development observed in the regions and the resulting differences in the income of residents are perceived as the main cause of economic migration. We can therefore discover the most about this type of relationship (i.e., emigration from regions) in economic approaches applied in migration analyses (e.g., Harris and Todaro 1970; Stark and Taylor 1991). These theories present migration as an economic phenomenon and, if they relate to its social determinants, they are perceived as complementary (de Jong and Fawcett 1981). On the other hand, the authors of theories perceiving migration as a result of the functioning of specific social structures (e.g., Wallerstein 1997) assume a different starting point. The theory of the world system also explains the occurrence of migration by differences between regions; however, the movements are understood here more as a result of the domination of regions with a high level of development over peripheral and backward areas. Also, in the concept of transnational social space, direct attention is paid to processes occurring in outflow regions and to relationships connecting them with inflow areas (Faist 2000; Pries 1999). On the other hand, the concept of social networks relates more to regional development and its important element (entity) – i.e., local communities (e.g., Massey 1999). The concept shows that migration networks are shaped in specific communities, which means that this type of relationship is typical of a given region; they also have their own origin, features and dynamics. In a sense, therefore, they are the result and a reflection of the processes in this region; also – which is a crucial factor for the formation of emigration regions – the operation of such networks significantly increases the probability of further emigration (Bertoli and Ruysen 2018; Łukaszewska-Bezulska 2021; Massey, Arango, Hugo, Kouaouci,

Pellegrino and Taylor 1994). The concept of transnationalism is closely related to migration networks. It assumes that migrants connect the spaces of their origin countries with those of the countries of migration destination. At the same time, they maintain strong contacts with their families remaining in the country of origin and with local communities. They play an important role in constructing migration networks and transferring economic capital but also play a symbolic role, initiating various social activities (Vertovec 2009).

Theories of regional development analyse migration as a process of spatial mobility in several ways. Some – for example, (neo)classical considerations and theories of polarisation – explicitly refer to people's spatial mobility while, on the basis of other concepts (e.g., endogenous development theories or most location theories), we can only draw implicit conclusions on the migratory aspect of regional development. In traditional theories and models of regional development, movements of production factors – including flows of people – are perceived as an important determinant of development. In the conditions of a modern economy, they should, instead, be approached as a complementary factor, building the exogenous activity of the region and supporting the latter's development (Piché 2013; Stough 2001). However, despite various perspectives, it can be said that migration is widely focused on theoretical considerations on regional development and spatial management. Migration is the most broadly discussed in the models of polarisation (Chase-Dunn and Hall 1991; Hojman and Szeidl 2008; Myrdal 1957; Prebisch 1950). It is even believed that the emigration of the best-educated, the most mobile and entrepreneurial people to developing regions is one of the main reasons for the development of a bipolar (polarised) system. Over time, the sharp polarisation of the development processes, which is a result of indirect cumulative causality, leads to the decrease in human capital in the sending regions and its accumulation in the recipient regions. It is accompanied by an increase in labour productivity in the latter and a decrease in the former (King 2018).

Neoclassical development models are useful in explaining regional development and identifying its determinants. They also directly apply to migration processes. As mentioned above, their basic assumption is that production factors seek a location which ensures the highest productivity (Nijkamp and Abreu 2009). Consequently, regional differences will continue to occur until the productivity of all production factors is equal everywhere. The lack of restrictions related to the flow of capital and labour – i.e., the fact that the production factors are fully mobile – is a very important element of neoclassical models. The free movement of labour and capital allows the achievement of a long-term balance between regions, possible thanks to the self-correcting mechanism. In highly developed regions, the cost of labour is high, due to its low supply (and high demand). This results in migration from regions with surplus labour, which is also relatively cheap. As a consequence, in more-developed areas the price of labour falls while, in the areas from which the labour force migrates, it increases due to the declining supply (e.g. de Haas 2021; Nijkamp and Poot 1998).

Summarising the above overview of migration theories in relation to the theories of regional development, where references are made to migration movements, one can assume, according to the authors, that the following theories are the most useful for conceptualising an emigration region:

- Oded Stark's theory of new economics of labour migration – because it draws attention to the fact that decisions regarding migration are made in social groups, such as the family, household or local community. In this case, the rationalism of choice is the basis for making decisions, which are taken collectively and may depend on the social structure, prevailing traditions, the socio-cultural system and other social determinants.
- Douglas Massey's theory of migration networks – because it assumes that, in creating and sustaining migration in time and space, connections in the form of an information network, assistance and specific obligations established between migrants and non-migrants in the host and sending countries are

important. Migration networks have their own genesis, development model, properties and dynamics; they are also the result of processes and factors specific for a given region.

- Ludger Pries' concept of transnational social space – because, in the formation of transnational migration spaces under the influence of geographic, cultural, social, economic and political factors, it draws direct attention not only to the regions of inflow but also primarily to the regions of outflow. Therefore transnationalism, understood among other interpretations as maintaining contacts between migrants and their families in the region of origin, sending goods and social transfers as well as migrants acting as 'social actors' can all be considered a significant characteristic of the emigration region.
- Gunnar Myrdal's theory of regional polarisation – because it broadly refers to migration as an important determinant in the formation of the bipolar system; it emphasises that the emigration of the best-educated, most mobile and most entrepreneurial people to developing regions threatens the development outflow regions and therefore is one of the main causes of polarisation.

Selected elements of the indicated theories, describing the impact of migration on regional development, are used in the further stages of the analysis. The findings of the research on the origins, permanence and broad influences of migration outflows on the patterns and directions of economic and social development of territories sending migrants – led to the formulation of the concept of the emigration region and especially to the presentation of the process of forming an emigration region, as well as the distinction and description of the features characteristic of such areas.

### **Methodology and data sources**

The concept of the emigration region presented in this paper is the result of many years of research by the authors on the issue of emigration and regional development. The studies included both quantitative and qualitative techniques and the issue of emigration was approached from the perspective of various groups and entities – i.e., both direct participants in the migration process (emigrants and returning emigrants) and representatives of local and regional self-government, public institutions and non-governmental organisations, whose activities are related to migration processes to a certain extent. The results of the research entitled *The Place and Importance of Foreign Migrations in Regional Development* (the project of the National Science Centre) are of key significance (Solga 2013). Research in this field was conducted (through questionnaires and in-depth interviews) with participating marshals of all Polish voivodeships (16 questionnaires), the presidents/mayors/heads of all the communes in the Opolskie Voivodeship (105 questionnaires and in-depth interviews), the directors of all district (*powiat*) labour offices of the Opolskie Voivodeship (11 in-depth interviews) and the directors of selected social welfare centres (10 in-depth interviews). As part of the project, the 71 local strategies of all municipalities of the Opolskie Voivodeship and the 16 regional strategies of all Polish voivodeships, were also reviewed with respect to emigration as a factor of territorial development. In the theoretical part of the project – which is crucial for the emigration region concept, the hypothesis is that an emigration region is formed under the influence of long-term and mass emigration resulting in progressive depopulation; it is characterised by a set of economic, social and cultural features clearly distinguishing it from regions where such a pattern of relationships is either missing or incidental. As indicated above, the theoretical framework for this concept was provided by the approaches formulated in Stark's new economics of labour migration, the theory of migration networks, the concept of transnational social space and the theory of regional polarisation.

On the other hand, in the empirical part of the project, foreign migration in all regions of Poland and selected European and non-European migration regions was recognised in terms of the causes, scale, nature and

consequences of the migration outflow, observed at the level of development of these regions. The issue of migration was analysed from the perspective of various aspects of development – i.e., from the point of view of the functioning of regional and local development units, the activities of selected institutions (e.g., the labour market and social welfare institutions), from the perspective of the strategic management of territorial units and from the development of entrepreneurship. The basic research issues concerned the following areas:

- the assessment of representatives of local and regional authorities regarding the impact of foreign migrations on development;
- the opportunities and threats for the development of regions and local communities resulting from foreign migration;
- the place and significance of foreign migration as a factor of territorial development compared to other development factors;
- the way of approaching foreign migration in strategic documents of territorial units (regions/cities/rural communes);
- the possibility of creating a migration policy at the regional level;
- the possibility to create instruments leading to the reduction of economic emigration and to support effective re-emigration by local and regional authorities; and
- the issues of re-emigration in the context of factors inducing and hindering returns to the region of origin and entrepreneurship among re-emigrants.

Research was also performed among people returning from abroad, mainly in relation to the need to create an institutionalised support system for returnees, as indicated in the concept. In the latter context, the results of the project of the Voivodeship Labour Office in Opole entitled *Developing Methods of Reducing Economic Emigration and Supporting the Return of Migrants to the Polish Labour Market* (in-depth interviews with 70 emigrants) were also used. Furthermore, the paper also considers the results of the research entitled *Influence of Foreign Labour Migrations on the Socio-Economic Situation of the Region. Analysis Based on the Example of the Opolskie Voivodeship as a Migration Region* (a project of the Ministry of Science and Higher Education) and *The Importance of Regional Determinants of Investing in the Process of Investment Location* (the project of the Ministry of Science and Higher Education). In the first case, the results of research among emigrants from the Opolskie Voivodeship (in-depth interviews with 60 emigrants) primarily used issues related to their entrepreneurship while, in the other, the most interesting area concerned the opinions of entrepreneurs regarding factors facilitating or hindering running a business in a region affected by significant emigration (surveys with 146 entrepreneurs from the Opolskie Voivodeship) (Heffner and Solga 2013).

The wide range of research and the resulting conclusions allowed for the formulation of synthetic assessments of the mutual relations between the socio-economic development of regions and the persistent migration outflow, as well as for indicating the possibility of formulating appropriate development policies for regions of this type.

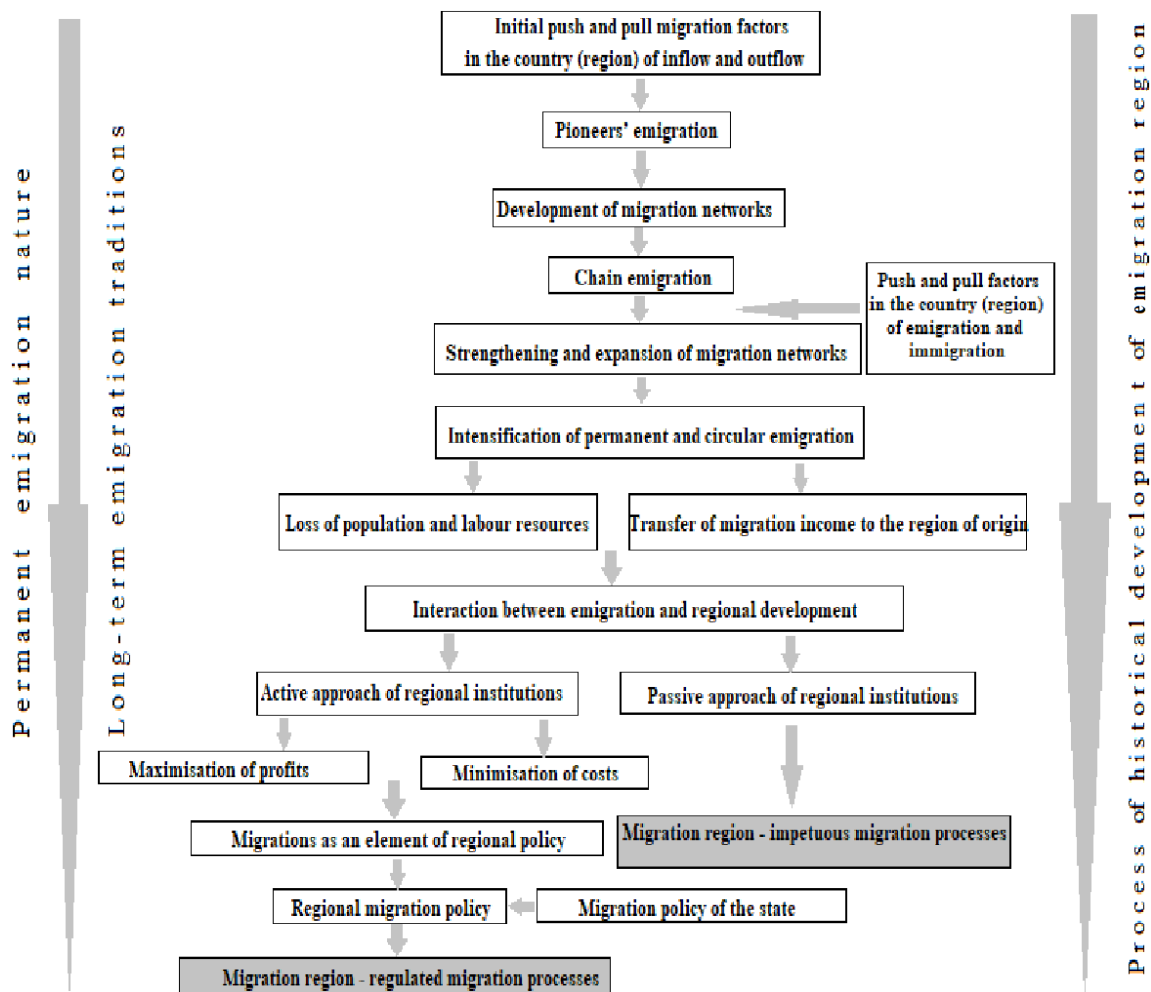
## **Research results**

### *The concept of an emigration region*

An emigration region is an area where outmigration is so important that it affects regional development processes to a significant degree (for example, it results in an unfavourable demographic structure, labour

shortages, limited social activity, the transfer of financial capital used for consumer or investment purposes) in an apparent (positive or negative) way. The driving forces behind the formation of regions with a clear migration factor of development include a well-established tradition of emigration and its long-term nature, a significant quantitative dimension of emigration, well-developed networks of social relationships between the outflow and inflow countries, complex socio-political and economic reasons for emigration, as well as its specific consequences, which are visible both at the individual (micro) level and at the (meso) level of local and regional communities.

**Figure 1. Mechanism of emigration-region development**



Source: Authors' case study.

An emigration region is formed in the historical process determined by the accumulation and mutual influence of certain economic, political and cultural reasons (*cumulative causation*) (Figure 1). We can therefore speak of an emigration region when a large number of permanent, temporary or circular migrations is observed in a given area, or if there is persistent emigration. Well-established migration traditions, the high level of emigration and its permanent character, as well as well-developed networks of migration connections, together with multiple reasons for emigration, are crucial elements determining the nature of the emigration region. Emigration is therefore such a significant phenomenon in a given region that it has a clear (positive or negative) impact on socio-demographic and economic processes. The depopulation of a region resulting from

emigration and its other consequences thereby becomes one of the main development factors affecting its current and future development (Heffner and Solga 2013). This situation is reflected in the development concepts formulated in the emigration region as well as in the strategic documents resulting from these concepts, where migration issues are the focus of a lot of attention and are perceived as important.

The notion of an emigration region in the proposed concept is considered from the point of view of the regional administrative unit of the country (e.g., in the European Union NUTS level 2). However, it should be noted that the emigration region can be defined in several ways, both with respect to larger areas, most often parts of the continent, as well as to individual countries and, as in the paper, to the administrative units of the country. Such references can be found, for example, in relation to the South-East Asian emigration region as a large area, to Ireland as a whole country and finally to the Oaxaca region in Mexico (Cohen 2010; Stephen 2007). David Chiavacci (2005) applies the notion of a 'migratory region' with reference to East Asia and analyses the factors that caused its emergence. He notices that migration flows in this area are set in the context of economic, political and socio-cultural processes that took place in individual countries of the region. Consequently, at the beginning of the 1980s they led to the emergence of a clearly identified emigration region. The factors leading to its formation included the economic elements (e.g., international corporations in two countries initiating a migratory movement), political relations between individual countries and geographical determinants. However, according to Chiavacci, the principal elements shaping the emigration region include the existence of an international network of relations as well as migration institutions and infrastructure functioning for the needs of migrants. Patrick Ziltener (2006) similarly identifies this area as a 'constituted migration region' and draws attention to the determinants shaping it (e.g., the geographical proximity of the migrants' main countries of origin, large income differences and migrants' social networks).

### *Features of the emigration region*

Through referring to the earlier review of migration theories and regional development theories, as well as considering the results of the present scientific research, the main characteristics of an emigration region and the mechanism of its formation were defined. Furthermore the following features specific to such an area were also distinguished: the significant quantitative and permanent dimensions of emigration, the complex determinants and traditions of migration, the broad network of migratory relations, the stability of migrants' relationships with the region of origin – the circular movements of migrants and sentimental tourism, significant migrant remittances influencing local development and emigration as a crucial determinant of regional development.

#### The significant quantitative and permanent dimensions of emigration

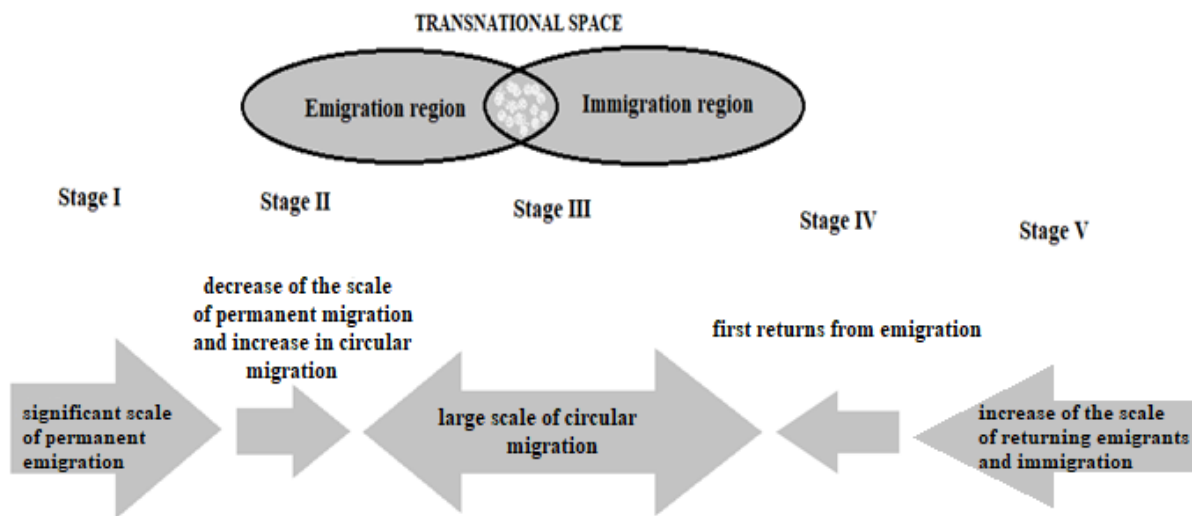
The emigration region has a long tradition of emigration on a significant scale. We can speak about a kind of emigration *continuum*, which leads to the permanent depopulation of such an area and results in specific social and economic effects. An emigration level of between 5 and 8 per cent of the (professionally active) population over a specific period can be considered a critical value, indicating the great importance of international migration in the population balance. Research in Central and Eastern Europe shows that, in regions facing long-term emigration, its scale is often higher than 10 per cent and may reach 15–20 per cent of the total population.

An evolution of the emigration process, determined by its social, economic and political transformations, can be observed in an emigration region. It can also be a result of changes in the destination countries. This evolution starts with settlement emigration, which is initially significant in quantitative terms and then changes



into the phase of the growth of circular migration and, at the continuously significant scale of circular migration, the significance of returns from abroad; immigration may increase in the emigration region, reducing the pressure of increasing demographic problems on the functioning of both regional demand, the labour market and public services (i.e. Klagge and Klein-Hitpaß 2010; Kubiciel-Lodzińska and Maj 2021; Kushnirovich 2019; Solga and Kubiciel-Lodzińska 2017) (see Figure 2).

**Figure 2. Transformations of migration processes in an emigration region**



Source: Authors' case study.

### Complex determinants and traditions of migration

In the emigration region, the mechanisms determining migration have a complex and multilateral dimension. The underlying reasons for mass movements include not only the classical determinants, i.e., differences in the level of socio-economic development between the emigrants' place of residence and the destination area and also other circumstances that affect the nature and scale of migration. Such determinants can comprise formal, political and social factors (e.g., immigration-friendly policies in the destination country or persisting patterns of migratory behaviour). Well-developed, thriving and broad migration networks as well as established and long-lasting migration traditions also sustain migration in the emigration region.

Furthermore, the culture of migration – i.e., a set of norms and views on the perception of the phenomenon of migration – is also an important emigration determinant (Kandel and Massey 2002; Massey *et al.* 1994). The migration culture determines the way of life of the emigration region community (families, households, local associations), which adapts it to the migration situation.

Explaining migration in the emigration region should therefore not only be based on the theories related to general *push* and *pull* factors (Lee 1966) and its criticisms (Haberkorn 1981; van Hear, Bakewell and Long 2018; Vogler and Rotte 2000). The explanation of movements only on the basis of macro determinants is certainly also an over-simplification. In the emigration region, migration should be perceived as a result of interactions between phenomena at the macro level and those at the meso and micro levels. Special consideration should be given to the fact that this process is not explained by a single determinant.

### The broad network of migratory relations

Migration networks should be credited with playing a key role in the process of creating an emigration region (Fawcett 1989). This is because migration is not only a result of an individual decision made on the basis of the calculation of profits (as advocates of neoclassical economics claim) or of an automatic impulse caused by changes in the global economic situation (as would result from the concept of the global migration system). Relations in the form of an information network, assistance and obligations that facilitate the decision-making processes (deciding on migration) and adaptation processes (abroad), shaped between migrants and non-migrants in the receiving and sending country/region are also important. As a result, due to this type of relationship, both settlement and temporary emigration become much easier there than in regions that do not have wide and efficient migration networks.

The networks of relationship of the emigration region have their own origins, development model, features and dynamics. They are a result of processes and factors specific to this region, so they also react to regional factors implying flows. The prevailing direction of emigration is the factor strengthening the functioning of migration networks. Their greater spatial diversity usually causes weaker network consolidation and thus fewer opportunities to fully use their potential (Solga 2015).

### The stability of migrants' relationships with the region of origin: circular movements of migrants and sentimental tourism

Migrants' social, cultural and economic networks are generally extensive in the emigration region. Their efficiency and dynamics depend on the length of migration traditions, the geographical dispersal of migrants' destinations and the level of their mutual integration abroad. Contacts between migrants (definitive) or their descendants and the community in the region of origin develop on the basis of these connections (Heffner 1999; Newbold 2020). Former residents, although already settled abroad, generally do not lose ties with their region of origin and often travel back to their 'roots'. In the case of temporary migrants, we deal with a circular movement between the emigration region and the area of residence abroad. Visits by both groups of migrants to their region of origin contribute to economic recovery and initiate social and cultural cooperation. Migrants often support their region of origin in an organised way (e.g., they establish emigrants' clubs which raise funds for business- and infrastructure-related initiatives). However, it should be assumed that, when the second or third generations of definitive migrants integrate closely with the society in the destination country, the links with their region of origin are of a merely nostalgic nature, if at all.

### Emigration as a crucial determinant of regional development

Socio-demographic and economic phenomena accompanying migration are extremely complex in the emigration region, both in spatial and political terms (regional policy). The extent and permanent nature of emigration entails certain demographic, economic and socio-cultural consequences, both positive and negative. Migration and its consequences in the emigration region is one of the most crucial factors directly determining the development opportunities of such an area (Heffner and Solga 2017). Mass emigration can lead to serious demographic disorders. This impact can be manifold and is manifested in a decrease in the birth rate, a decline in fertility, deformations in the structure of age and sex of the population, an ageing society, a decreasing number of marriages, a growing number of broken families and a weakening of social bonds. Emigration can become a factor intensifying the demographic crisis (Heffner, Klemens and Solga 2019).

At the same time, mass emigration can also have a positive impact on reducing the unemployment rate in the emigration region. A level of emigration exceeding the unemployment level may reduce its stimulating impact; however reducing unemployment may not necessarily be accompanied by a simultaneous growth of employment and business activity. The transfer of significant financial resources to the region by people working abroad, which translates into an increase in investment in individual ventures improving the quality of life and social prestige, may do little to increase development potential. This means that emigrants may be less willing to take risks associated with entrepreneurial activities and can easily accept continuing foreign circular migration. As a result, new workplaces are not created in the emigration region, which further encourages groups of residents to seek employment abroad.

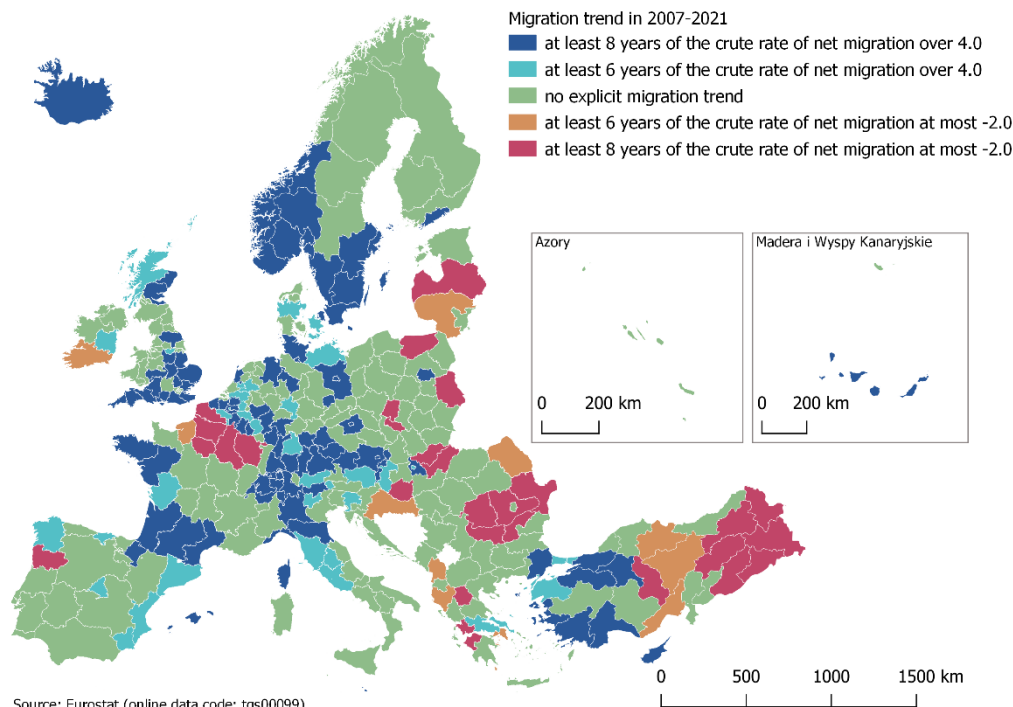
The adverse impact of emigration (definitive and circular) on economic development in the context of the *brain drain* phenomenon is also important. There is a constant drainage of the most active and best prepared or educated residents, who can change circular economic migration into definitive emigration. As a result of this trend, the emigration region loses its most mobile labour resources and their gradual negative selection is observed. Emigration may include large groups of employees with certain specialisations (e.g., in construction, food, agriculture, horticulture and medicine) on local labour markets, which significantly weakens the region's location potential and, as a result, also its investment attractiveness. This situation may adversely affect the development of small and medium-sized enterprises which, in a situation of persistent intensified emigration, lose their opportunities for activity and development.

The social consequences of family separation and the disintegration of family ties are especially disadvantageous. Emigration from the region usually contributes to the emergence of broken families as well as the cultural and social approval of the family model functioning in a state of permanent separation. Due to the growing scale of emigration, the incidence of this category of families and their problems increases the most frequently (Solga 2014).

### **The concept of an emigration region as a result of research on the impact of external migration on the development of the Opolskie Voivodeship**

The concept presented here of an emigration region is applicable to territorial structures characterised by a significant and long-lasting outflow of migrants, which permanently affects demographic, social and economic processes, significantly hindering and slowing down their development. As indicated in the introduction, Poland is an emigration country with a growing share of immigration, still characterised by a high scale of outflow and its significant spatial concentration in the regional system. The Opolskie Voivodeship is one of the most distinctive regions, where features of territorial emigration structure have emerged. Studies thus far show that this area is one of the most important emigration regions – not only in Poland but also in a broader European approach (see Figure 3).

**Figure 3. Permanence of significant migration outflow/inflow as a feature of emigration and immigration regions**



Source: Eurostat (online data code: tgs00099).

Though, after 2004, the quantitative dimension of migration outflow from regions of marginal importance increased, the Opolskie Voivodeship is still an area with a considerable scale of outflows. An analysis of the number of emigrants per 1,000 inhabitants shows that the most intensive outflow of population abroad (106 people per 1,000 inhabitants) on a national scale is still in the Opolskie Voivodeship (Census 2011 data and subsequent CSO estimates). Also, in the European context, the region belongs to the group of entities with a long-term negative population balance resulting from the permanent outflow of migration (DEMIFER 2010), which constitutes a set of characteristics typical of an emigration region. On the basis of a multi-annual series (2007–2018) relating to regional migration flows in the regions of Europe (NUTS-2 units), they were classified in the context of the relative net migration balance and the length of the period with a positive or a negative balance of flows. This provided the basis for determining the sustainability of these phenomena on a regional scale in Europe, with the main focus on groups of regions in which a clearly positive (immigration) or negative (emigration) balance of population flows was maintained during most of the period analysed. It should be clear that the data concerning migration flows on a regional scale in Europe are burdened with numerous and common inaccuracies and, moreover, that there are also gaps in information as well as inconsistent rules for separating regional units in EU countries and changes in their scope. However, if the persistence of migration trends is the main factor analysed, despite the above limitations, they provide an interesting image of the distribution of regions with a completely different development situation caused by the possible impact of migration. These are mainly regions where the migration outflow or inflow is a constant (or relatively constant) component of population changes interacting and having a long-term impact on regional development processes. This may also be a symptom of significant inequalities in the level of development of European regions (Iammarino,

Rodriguez-Pose and Storper 2019). In Poland there are several regions that clearly have an emigration character (Lubelskie, Opolskie, Warmińsko-Mazurskie, Podlaskie and Podkarpackie).<sup>1</sup> This type of region is also found in France (5), Greece (4), Hungary (3), Bulgaria (2), Portugal (1), Romania (1) and Latvia (1). There are many more immigration regions, mainly found in Germany (17), Great Britain (16), France (5), Northern Italy (5), Sweden (6) and Norway (6), as well as Belgium, Spain, the Netherlands, Finland, Denmark and Luxembourg (see Figure 3).

A constantly negative migration balance was recorded in the Opolskie Voivodeship for almost the entire period after World War II (from 1950), mainly due to intensive, historically determined emigration, primarily to Germany. By the end of the 1990s, over 200,000 people had emigrated, mainly those with dual (Polish–German) citizenship living in compact areas of the central and eastern part of the region. Emigration covered the entire population growth of this group of people from 1975 to 2000, and in many communes the outflow even significantly exceeded it. It is estimated that the current scale of labour emigration, including circular and seasonal migration, is approximately 120,000 people.

The persistence of a permanent and quantitatively significant level of emigration in the Opole region is possible thanks to the existence of a well-established, resilient, dynamic and well-developed network of migration links between the inhabitants of the Opolskie Voivodeship and the countries of Western Europe, mainly Germany, as a result of (or resulting from) permanent and long-term emigration. Similar migration networks can also be noticed in other regions of Poland – e.g., Podhale and Podlasie (Górny and Śleszyński 2019) – and abroad (Keles 1985); however, they are nowhere so well-developed and versatile. The research showed that in the 1990s for every 100 people in the Opolskie Voivodeship there were over 120 family members living in Germany.

Due to the large scale and durability of emigration, its consequences for the development trends of the Opolskie Voivodeship are clearly visible. They have a special impact on the deteriorating population situation. The constantly negative emigration balance, which has been observed for several decades, together with the negative population growth, has led to a continuous decline in the region's population. According to projections, by 2050, population losses may even have reached a quarter of the current figure. The economic consequences are also important. While absorbing some of the mobile labour resources, emigration affects its supply and availability on the regional labour market and, at the same time, reduces the unemployment level. The research shows that unemployment in the Opolskie Voivodeship would be twice as high if all its former inhabitants working abroad returned and registered for employment in the region. On the other hand, emigration affects the loss of labour resources. Some local labour markets lost 20–30 per cent of all their workers, especially in certain industries – mostly construction and the healthcare sector. Labour shortages are a significant problem, reducing the investment attractiveness of the region and becoming a barrier to many companies' development. Local and regional survey evidence has shown that significant money transfers (remittances), which raise the migrant families' standard of living but do not substantially translate into an increase in investment and growth in the level of entrepreneurship, are of vital importance, both for local and regional development in the Opolskie Voivodeship.

The issues closely related to emigration and its economic and social consequences are a particularly crucial element of the development policy of the Opolskie Voivodeship, at both a regional and a local level. They can be seen both in these regions' strategic documents and in the projects for practical solutions that take account of migration issues. At the regional level, the most important initiative is the *Program Specjalnej Strefy Demograficznej 'Opolskie dla Rodziny'* (the *Special Demographic Zone Programme 'Opolskie for the Family'*), which was created as a separate operational tool suited to the demographic situation in the region. At the national level, the programme is a pioneering project that contains the concept of managing a region facing the permanent loss of human resources. Regionally implemented organisational measures in the social

sphere, political recommendations highlighting the migratory background of the region's slowdown in development and numerous initiatives supporting economic increase (e.g. establishing companies by re-emigrants, investing in local initiatives, strengthening entrepreneurship, attracting competitive investors, etc.) are manifestations of specific, characteristic features that distinguish the development of emigration regions from other types of regional structure.

## Conclusions

The existing literature on the relationship between migration and the development of regions dominated by migration outflows focuses on the analysis of factors favouring outward migration. These factors include, especially, migration networks (e.g., DiMaggio and Garip 2012; Lamela, Pérez-Caramés and Fernández-Suárez 2012; Palloni, Massey, Ceballos, Espinosa and Spittel 2001; Stenning and Dawley 2009), some of the effects of emigration (e.g., Clark and Drinkwater 2008; Garip 2012; Garip and Curran 2010; Garip *et al.* 2015), the transition process from pioneer migration originating in a particular region to transnational networks and migration systems (e.g., Bakewell, de Haas and Kubal 2012; van Hear *et al.* 2018) and on the extent to which the state migration policy has intervened in this process (e.g., Czaika and de Haas 2013).

It is the intention of the authors to contribute to and build on the existing literature by pointing out the holistic dimension of the process of forming an emigration region, the factors that characterise this type of region and the multidimensional consequences for its development. As it stands, the article fills a gap in the theoretical perception of the emigration region.

Several years of research enable us to demonstrate that the emigration region is an area where outward migration is such a significant phenomenon that it explicitly (in a positive and/or negative way) affects the socio-demographic and economic processes in such an area. According to the assumptions of the methodological section, in addition to the definition of an emigration region proposed above, it is also possible to indicate the factors affecting the formation of such an area. The driving forces behind the emergence of regions with a clearly identified emigration factor of development include:

- a well-established tradition of emigration and the long-term nature of emigration;
- a significant quantitative dimension of emigration;
- well-developed networks of social relationships between the country of outflow and that of inflow;
- the complex socio-political and economic reasons for emigration; and
- the specific consequences of emigration, observed both at the individual (micro) level and at the level of local and regional communities (meso).

A migration region has a long tradition of migration and the scale of emigration is significant there. In the emigration region, the mechanisms determining migration have a complex and multifaceted dimension. The causes of mass migration are not only based on classical factors such as differences in the level of socio-economic development between the emigrants' place of residence and the destination area but also in additional circumstances that affect the nature and scale of migration. Formal and political considerations or social factors (including an immigration-friendly policy of the country of immigration or persistent migration behaviour patterns) can represent such determinants (Aslany, Carling, Mjelva and Sommerfelt 2021). Well-developed migration networks and long migration traditions also sustain migration in the emigration region. As an effect, due to this type of connection, both permanent and temporary emigration become much easier to achieve than in regions without broad and efficiently functioning migration networks. As a result of these connections, international migration becomes a social process, gradually involving both local communities and foreign

clusters of migrants from those communities. Based on these connections, contacts of (definite) migrants or their descendants with members of the community of the region of origin are growing. The massive and permanent nature of migration entails certain demographic, economic and socio-cultural consequences – in both positive and negative dimensions. In a migration region, they become significant factors directly affecting the possibilities and directions of development of such an area.

This situation therefore poses a serious threat to the further development of a region like this. Findings relating to countries of migration outflow are fully applicable here, indicating that emigration is highly selective and affecting predominantly the most dynamic, younger and better-trained elements of the regional population (Budyta-Budzyńska 2016; LeSage and Ha 2012). Outflows incur costs for emigration regions (education and training are investments in human capital that result in the development of host regions) and, in long-lasting terms, give a negative effect in both considering the region's growth potential as well as in decreasing chances for the improvement of the attractiveness of investment and the regional labour market, since human capital plays a decisive role in both processes (i.e., De Haas 2007b; Alonso 2011; Dustmann, Fadlon and Weiss 2011).

Extensive research in the Opolskie Voivodeship has shown that the persistence of the migration outflow process and its impact on the declining demographic potential of the region, the population ageing and qualitative deficits in the labour market are all caused by the long-lasting lack of significant changes in the structure of the region's economy. Too-weak external intervention, aimed mainly at improving infrastructure and accelerating economic development (e.g., resulting from the EU cohesion policy), is not sufficient to reverse migration outflow trends if achieving a higher level of development is not accompanied by profound structural changes in the region's economy (e.g., attractive jobs, institutions and companies employing regional university graduates, higher spending on the development of the regional R&D sector, etc.). Such a situation has been persisting in the Opolskie Voivodeship for several decades and therefore the migration syndrome has become a permanent and characteristic feature of its development.

Based on the research we conducted, some political implications may be also formulated which, according to the research assumptions, can be applied to the implementation of development policy in emigration regions. The negative impact of a continuous, negative balance of international migration on the demographic and socio-economic structure of the emigration region indicates the need to develop a clearly specified policy that takes account of migration issues (a regional migration policy). Activities in the sphere of emigration are extremely important, primarily in terms of the protection of human and intellectual potential, the prevention of permanent emigration and, at the same time, the promotion of the temporary emigration that enables the personal and socio-cultural development of migrants and the strengthening of their business opportunities. Activities in the sphere of returning emigrants are also important. As indicated, the benefits that returning emigrants can bring include their human capital (education, qualifications, training and knowledge), financial capital and entrepreneurial potential (foreign investment, trade, remittances, savings, investment in new businesses, purchase of real estate, and charitable support), social capital (the networks of contacts, norms and values facilitating cooperation within various groups) and affective capital (commitment and goodwill arising from emotional ties with the region of origin; cf. Roos 2021). Research at the regional level in Poland shows that, despite the significant impact and importance of emigration and return migration, the best results in emigration-region development may be achieved from a comprehensive approach to the regional development policy where the migration outflow is only one of several elements related to the emigration region's development path. This means that, while establishing its foundations and then undertaking activities, all elements related to the broadly understood foreign mobility of the regional population should be considered (Iammarino *et al.* 2019). They include not only departures and returns but also immigration by foreigners and potential emigration, including foreign students (Rokita-Poskart and Mach 2019).

As indicated in the theoretical section and re-iterated in the methodological part, the concept of an emigration region was developed based on the migration experience of the Opolskie Voivodeship. It is assumed that this concept can become a good starting point for further scientific discussion identifying further features of the emigration region (for example, return migration or the transformation of the emigration region into an immigration region due to the influx of new residents and workers mitigating the labour market losses) and supplemented with further examples of European and non-European countries and regions. The concept of a migration region can also be an important starting point for expanding migration theories to include issues related to the relationship between migration and regional development. The main contribution to these theories is the statement that, in regions characterised by a significant and long-lasting population outflow, migration becomes a significant component of regional development. In both a positive and a negative sense – and through direct or indirect means – they affect the fundamental determinants of regional development: human, social and financial capital. The assessment of this impact can be ambivalent, although a number of studies, including those presented in this article, indicate to a lesser extent the opportunities and, to a greater extent, the threats associated with the process of emigration for sending regions.

## Note


1. Opolskie, Lubelskie, Warmińsko-Mazurskie, Małopolskie, Podlaskie and Podkarpackie voivodeships are regional units in the administrative division of Poland; in the common classification of territorial units for EU statistical purposes, they are NUTS-2 level units. NUTS (*Nomenclature des unités territoriales statistiques* (fr.), *Nomenclature of Territorial Units for Statistics* (eng.)) is a geocode standard for referencing the administrative divisions of countries for statistical purposes used in the European Union. It was adopted in 2003, developed and regulated by the European Union. Actually covers the EU member and candidate states in detail. The Nomenclature of Territorial Units for Statistics is instrumental in the European Union's Structural Funds and Cohesion Fund delivery mechanisms. The structure of NUTS comprises 3 hierarchical levels NUTS-1 (Macro-regional), NUTS-2 (Regional) and NUTS-3 (Sub-regional) (<https://ec.europa.eu/eurostat/web/nuts/history>).

## Conflict of interest statement

No conflict of interest was reported by the authors.

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