

**MIGRATION AND REMITTANCES
IN TWO LEBANESE VILLAGES**

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**THE EFFECTS OF MIGRATION AND REMITTANCES
ON TWO LEBANESE VILLAGES**

By

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A B S T R A C T

This thesis studies the effects of migration and remittances on two villages in south east Lebanon. The human capital theory of migration, and that of migration *and* remittances which is developed by Stark and Lucas (1985) and Lucas and Stark (1988) constitute the conceptual framework of the research. Data for the thesis were gathered by surveying households in the Muslim village of Lala, and the neighbouring Christian village of Khirbit Kanafar. These data immediately reflect two realities: the internal migration of Khirbit Kanafar residents, and the international emigration of those from Lala. Moreover, remittances to Khirbit Kanafar are almost non-existent and those to Lala are massive.

Based on the theoretical synthesis, hypotheses were developed and later tested using three multiple regression models: one for remittances to Lala, and the other two are for the domestic income in each of the villages. A finding from the remittance model supports the theoretical hypothesis that sons in their early years of migration can not and do not remit. Such migrants are likely to face unpredictable job prospects and are usually in need of cash to get established. Once migrant sons are established, remittances to their families of orientation increase and continue to flow (at a slower rate) fifteen or more years after emigration. This reflects not only

the apparent permanency of migrant sons' commitment to the insurance contract they struck with their families, but also to a continued sense of altruism towards them. Another finding that concurs with the theory pertains to migrants' rural investments which are facilitated by residual family members and is argued here to be *mutually* beneficial.

Altruism emerges to be a greater motivation for remittances than self-interest and a familial insurance-type contract, a finding that detracts from the theory. Similarly, emigration does not appear to be a family strategy to increase income by adopting new agricultural techniques.

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I N T R O D U C T I O N

1.0 A G E N E R A L V I E W

The movement of people across international boundaries is an issue that is getting increasing attention, especially after the recent collapse of communism in Eastern Europe and the ensuing freedom of travel for the nationals of these previously closed societies. Another recent incident, the Gulf War, highlighted the high level of international migration to the Gulf states, and the oil-rich states' high level of dependency on migrant labour.

International migration has had far-reaching socio-economic, cultural, political, and demographic consequences on both the receiving and source countries. A major consequence of migration is remittances, the cash flow that migrant workers send or bring back to their home countries, towns or villages. The general goals of the theses are to understand the effects of emigration and remittances on the economies of two villages in south east Lebanon.

This chapter briefly reviews a few selected studies related to migration and remittances. The review is organized by macro- and micro-level studies and tries to

point out that they are either too broad to be of relevance here or too cultural and anthropological which cover migration but largely neglect the issue of remittances. It is worth noting that Khuri's (1967) article which is of significance to this research is reviewed in depth in Chapter five, and various theoretical studies are reviewed and synthesized in chapter two.

The objectives of the thesis are then discussed. Finally, the organization of the dissertation, including a brief synopsis of the chapters that follow, is briefly outlined.

1.1 Macro-level studies

Many major migrant-sending countries like India, Pakistan, Bangladesh, Yemen and Jordan have become quite dependent on remittances as a major source of foreign exchange earnings, and as a way to manage their balance of payments (Gunatilleke 1986). For example, a 1982 Bangladesh study estimated that remittances amounted to 65.8 per cent of export earnings and covered approximately 73 per cent of the value of oil imports (Osmani 1986). For India, remittances amounted to approximately 25 per cent of export earnings for the year 1982, and 28 per cent for Sri Lanka (Osmani 1986). According to Choucri (1986), the largest receivers of remittances in 1983 in the Middle East were Egypt (US\$3.3 billion), Turkey (\$1.5), and North Yemen (\$1.1). The impact of this rather large flow of capital into poorer countries is also measured by the ratio of remittances to the gross domestic product of a country. This ratio was 0.10 for Egypt, 0.28 for North Yemen, and 0.27 for Jordan in 1983 (Choucri 1986).

Studies done by Choucri (1986), Swamy (1981) and Chaudhry (1989) focus

their attention on the macro picture, especially the role of remittances in influencing the national (home) economy through, among other ways, the fluctuation of the exchange rate of the local currency relative to the hard currency. Another focus is on the influence of labour remittances on the ability of state bureaucracies to respond to their economic crises.

One consequence of migration that has been studied in the Middle East is its effect on women's roles, the sexual division of labour, and on the family structure as a whole (see for example Taylor (1984) and Hammam (1981)). Because emigration is usually male-selective, the absence of men resulted in a drop in the total fertility rate and has given women a greater role in running the affairs of the family.

Another consequence of migration, particularly on rural societies, has to do with its effects on agricultural sector. For example, North Yemen which was once self-sufficient in terms of food, became a net food importer in the 1970s and through much of the 1980s. This was due to the much higher salaries abroad (mostly in Saudi Arabia) hence making emigration a more attractive alternative than agricultural work (Swanson 1989; Eickelman 1989). Eickelman (1989) notes that grain production became decreasingly viable in North Yemen primarily because of the labour-intensive nature of the activity and the high costs of labour.

While there have been a number of studies that deal with the national impact of migration and remittances on a macro national level¹, very few studies have been

¹ The above mentioned studies are but a sample of migration and remittances research in Developing Countries. They are chosen for their Middle Eastern orientation, and are mentioned to illustrate a specific point. There are many sometimes detailed references to numerous other studies throughout this dissertation.

done on a micro village level, and none in the Middle East².

1.2 Micro-level studies

There is a need for village-level studies on the impact of migration and remittances on small rural communities. According to Bilsborrow (1984, 407) there are at least three reasons for having village-level studies.

"First, inferring causal relationships from relationships observed at the macro level is often risky because many macro variables are intercorrelated and therefore the direction of causation is ambiguous. Second, much social and economic theory, insofar as it can yield hypotheses about human behaviour, is micro-level theory."

Therefore, in trying to understand the behaviour of individuals from aggregate data alone, a research may fall victim to "ecological fallacy", that is, inferring relationships about the behaviour of individuals from aggregate data (Bilsborrow et.al. 1984).

Third, village-level policies include the provision (or non-provision) of infrastructure (roads, electricity) and location of facilities and services (schools, clinics), all of which are factors that affect levels of emigration from, remittance investment in, and returnees to a particular village.

Villages in Lebanon have been the subject of a few studies, often by anthropologists and sociologists. Earlier studies had never covered the effects of migration on a village in any depth. For example, in a classic village study, Guilek (1955) focused on the social structure and cultural change thus a detailed description of customs, beliefs, values and life in general in Munsif, a Christian Lebanese village.

² Khafagi (1983) studied the socio-economic impact of emigration on an Egyptian village. The problem with this study and with many others is their casual treatment of remittances, and their scant (and sometimes lack of) a theoretical framework.

He states that there is a large number of villagers abroad, most of whom are permanent emigrants. Guilck who suggests that remittances were at that time on the decline, states that the majority of emigrants never returned to their village thus resulting in the complete disappearance of certain lineages from the village.

Peters (1963; 1972) wrote two papers about rank and social status among Muslims in a Lebanese village. While in his first paper he identifies land as a central symbol of status, Peters' second paper asserts that landownership, while important, is rapidly losing its social importance in the face of improved access to schools, high rate of emigration among the poorer households, remittances, and entrepreneurial successes.

Peters (1972) notes that returnees brought with them changed notions of housing, marriage, family and society, as well as new tastes in a number of commodities which precipitated a decline of many traditional crafts. In short, returnees' experiences in the West profoundly altered their village lives.

There have been few studies about rural politics in Lebanon notably that by Khuri (1972). It focused on traditional village politics which is based on family alliances, and on the sectarian identities of villagers which they maintain even after they emigrate from the village to the city.

With the exception of Khuri's (1967) paper, the above-mentioned studies offer a general description of cultural life in certain Lebanese villages hence a great deal of attention on issues such as ceremonies of marriage and rituals of death, village lineages and titles, and village festivals.

One can then conclude that there are numerous studies on the impact of emigration and remittances on the national economy, and very few studies done on the effects of emigration on a village, town or city. In fact, this dissertation is the first in-depth comparative study of migration and remittances from a Muslim and a Christian village. Khuri's (1967) rather curt and now dated study of migration from two Lebanese villages ignored the remittance question almost completely³.

2.0 THESIS OBJECTIVE

The objective of this thesis is to study the effects of emigration on rural economies. The conceptual objective is to test the very recent and yet untested theory of migration and remittances as put forward by Stark and Lucas (1985) and Lucas and Stark (1988). While there have been some studies done on migration and remittances in Third World settings, such studies lacked a conceptual framework, thus Stark and Lucas's two theoretical papers are a welcomed addition to the discipline. Their formulations which are based on insurance implicit contract theory facilitate the generation of testable hypotheses. Their brief theoretical reasoning is expanded in this thesis, and additional but relevant theories such as the human capital theory of migration, implicit contract approach and its enforceability are also blended to broaden the scope and explanatory potential of the existing theory. Therefore, it is hoped that by testing this new theory and by synthesizing other bodies of relevant literature, a step will be made towards the development of a more comprehensive and encompassing theory that may be able to explain myriad

³ Khuri's (1967) study is dealt with in detail in chapter. five.

phenomena in the area of migration and remittances in less developed countries.

Emigration is a widespread but poorly understood phenomenon in Lebanon. Estimates reveal that in ten years of civil war (1975-1985) more than 2.5 million people (of a total population of around 3.5 million) were forced to flee their homes at least once (Faour 1985).

This is not to say that internal and international migrations are a recent phenomenon. In fact emigration from Lebanon dates back to the middle of the nineteenth century when mass emigration from Mount Lebanon⁴ was initiated largely due to the civil war at that time (Issawi 1982). Emigrants of Lebanese descent are estimated to number around sixteen million.

Emigration and remittances are so central in Lebanese society that the former have always constituted a "safety valve" for the population, and the latter sustained the country (innumerable communities to be sure) especially through the recently-ended fifteen year long civil war. Therefore, another objective of this thesis is to shed some light on two villages of different religious denominations in their post-migration phase. Specific questions regarding the effect of emigration and remittances on village development especially as they pertain to the agricultural sector and sources of domestic income.

It should be clear from the outset that this dissertation does not contend to reflect the provincial let alone the national picture in Lebanon. This research should not be incorrectly used to infer from observations on lower-level units about the

⁴ The province of Mount Lebanon was expanded in 1920 to include the current borders of the state (see chapter 3).

condition or behaviour of higher level units. (That is known as "individualistic fallacy" (Bilsborrow 1984)). Generalizations can, however, be made regarding villages with similar socio-economic and political characteristics. Almost all of the Christian and Muslim villages in the Western Biqa'a administrative unit have similar experiences to those in Lala and Khirbit Kanafar. In fact, from personal experiences and travels in Lebanon, I know of numerous villages that have circumstances similar to those of Lala and Khirbit Kanafar.

3.0 THESIS ORGANIZATION AND SYNOPSIS

In this thesis, the effects of migration and ensuing remittances are discussed and analyzed at the village level. Two contiguous Muslim and Christian villages are studied and compared in terms of how emigration affected the household and village economies.

The second chapter is a synthesis of Stark and Lucas's (1985) theory of migration and remittances with that of human capital migration. This theoretical fusion is useful in terms of providing the current study with a framework for analysis of the questions at hand. It should be noted that the paper by Stark and Lucas (1985) and that by Lucas and Stark (1988) constitute the only theoretical framework that explicitly deals with migration and remittances. Based on the theoretical formulation outlined in the chapter, a number of research hypothesis are advanced.

The third chapter sets the national scene for the thesis. It is a general discussion about the delicate nature of population statistics in Lebanon and the reason for the absence of population censuses since the last one was taken in 1932.

After outlining the geo-sectarian structure of Lebanon, this chapter then discusses how the population size of each religious group affects its political representation (and economic development) in the country.

There is also a discussion about internal migration in and international migration from Lebanon and how they constituted part of the prelude to the civil war in the country. Later in the chapter, the province of Bīqā'a is discussed with an emphasis on the Western Bīqā'a administrative unit, the area where the two villages being studied are located.

The fourth chapter outlines the methodological approach of this thesis. It discusses the questionnaire survey used to collect data for the research project, and more briefly the civil war conditions under which the survey was carried out. The chapter starts by briefly recounting (chapter three offers a full account) the specific reasons that compelled this researcher to collect field data as opposed to published government statistics. Then a detailed account and discussion of the specific survey questions is offered.

The fifth chapter is the analysis chapter. It starts with a general discussion about the level and destination choice of migrants. Khuri's (1967) approach in explaining emigration from a Christian and a Muslim village in Lebanon were critically used as a spring board to explain the reasons behind the international emigration of Lala's Muslims (primarily to Canada and Brazil), and the internal migration of those from Khirbit Kanafar (primarily to Beirut and the Christian enclave).

The effects of emigration on the household economy is a focus of the thesis, and that remittances are a major source of change in the post-migration period. A detailed discussion of the factors that lead Lala emigrants to remit to their residual family members is, therefore, offered. This discussion is oriented around testing of hypotheses which are outlined in an earlier chapter. Because Khirbit Kanafar receives almost no remittances, the discussion is oriented more towards understanding the reasons behind this rather unusual phenomenon. The last section of this chapter offers a summary and an extension of Stark and Lucas's (1985) theory of migration and remittances.

The sixth chapter offers a summary of the major findings of the thesis, and outlines ideas for future research that will fill in the gaps left unanswered in this dissertation.

Therefore, this thesis commences by sketching the conceptual framework within which migration and remittance research is done, and the framework used to answer various questions in this case study.

C h a p t e r T w o

MIGRATION AND REMITTANCES IN DEVELOPING REGIONS: A THEORETICAL FRAMEWORK

2.0 INTRODUCTION

In less developed countries (LDC), migrants' transfers of cash to their countries of origin, or remittances, are an important consequence of emigration which can have great effects on the receiving area. Although there are a number of empirical studies on emigration and remittances, a theoretical framework linking the two processes was only recently put forward by Stark and Lucas (1988). Their work is based on the theory of migration as an investment in human capital and potential, an approach that appears able to provide a suitable framework through which emigration from and remittances to developing countries can be better understood and conceptualized.

This chapter first reviews the human capital theory with particular attention to its application to migration (Sjaastad 1962) and remittances. Migrants' remittances can be better understood if the factors that led to their emigration are considered, thus the push-pull model is explained in the context of the human capital theory of

migration. Finally, Stark and Lucas's (1988) theoretical framework linking migration and remittances is reviewed and critiqued.

2.1 THE HUMAN CAPITAL THEORY OF MIGRATION

Migration, like education, was viewed by Sjaastad (1962, 83) to be an "*investment increasing the productivity of human resources*,"¹ an investment in migrants who endure costs and expect future improvements in their material and/or social well being. In other words, moving to a new location where the potential for economic advancement is increased has the attributes of an investment. Because this investment is embodied in the human being, it is an investment in human capital which is, by definition, the employment of resources for the development of human capacities from which a future improvement of an individual or of a family's welfare occurs (Bodenhoffer 1971).

There are many manifestations of human capital investments which include: the use of leisure time to improve skills and knowledge; opportunity costs such as foregone earnings while training on the job or while graduate students are attaining higher education; attributes such as health care, food, shelter and education; finally, skills and abilities, personality, appearance, reputation, and relevant job qualifications (Schultz 1961; Becker and Tomes 1986).

Just as education increases one's earning ability, the geographical mobility of workers increases their earning potential by taking skills and transferring them to a place where they are in greater demand and receive greater returns. Economic

¹ Emphasis in original.

theorists assert that expected rates of return for an investment opportunity and the incentive to invest are positively correlated (Bodenhoffer 1971). Therefore, the human capital theory of migration states that a potential migrant will consider investing in moving to a new destination if total expected earnings, net of migration costs, exceed anticipated net earnings at the place of origin (Harris and Todaro 1970; Sjaastad 1962).

2.1.1 Costs and Returns of Migration

Like other types of investments, there are costs and returns, both monetary and non-monetary, associated with migration. The former includes direct costs such as out-of-pocket expenses for transportation costs; the cost of getting rid of property; opportunity costs such as foregone wages while in transit, searching for employment, and while in training or upgrading skills for a new job. Non-monetary or psychic "costs" include leaving familiar social and physical environments, and adopting new dietary habits. There is also the loss in the value of location-specific assets, such as clientele, that are more valuable at the current location than elsewhere. Most of these costs are difficult to measure, so case studies have been limited to income variables (Oberai and Bilsborrow 1984).

On the other hand, some returns of migration are monetary in so far as a migrant's income is expected to improve. Non-economic returns such as "psychic benefits" accrue to migrants living in locations of their choice.

One of the strengths of the human capital approach to migration is its consideration of the element of time; i.e., the benefits and costs of migration may

accrue over an extended period. Accordingly, the age selectivity of migration is due to the fact that the greater the age the higher the psychological and monetary costs; the latter could take the form of a loss of seniority or pension. Thus the young are more prone to migrate because they are more adaptable to new environments (lower psychic costs). Moreover, the young have a longer expected working life over which to reap benefits.

The human capital approach to migration amounts to a cost-benefit analysis of human migration. Geographical mobility is however not simply a question of trading better opportunities elsewhere against migration costs. It also depends upon the availability of information about distant opportunities; information that has to be acquired and perceived. The question is then, does peoples' access to "satisfactory" income-generating opportunities such as land and jobs affect their level of human capital investment? If so, how does this affect the migration flow and destination choices in terms of internal versus international migration? These questions can be answered by impregnating the push-pull model with human capital theory.

2.20 THE PUSH-PULL AND THE HUMAN CAPITAL MODELS: A SYNTHESIS

The push-pull model of migration is a *general* conceptual framework that purports that people get pushed out of their community due to factors such as population pressure, shortage of land, and high unemployment. Others get pulled to urban areas by the "bright lights", better income-generating opportunities and enhancement of life style by access to urban facilities.

The push-pull forces are defined in broad terms by Diamantides and Constantino (1989, 3) as a combination of continuously changing socio-economic conditions at the country of origin and "ameliorating circumstances" at the intended country of destination. The dynamic socio-economic conditions that affect the push-pull forces influencing the migration stream are captured in Diamantides and Constantinou's (1989) macrodynamic model of international migration from Cyprus. These conditions include migration laws at the countries of origin and destination, as well as recessions, poor crops, and political unrest.

Permanent emigration from traditional communities with adequate agricultural resources is almost non-existent due to the balance of the available resources and population there. This harmonious situation breaks down in the face of rapid population growth, limited resources and employment opportunities. Therefore, villages with low availability of land and few income-generating opportunities to supplement agricultural income from non-farm activities will witness a resource-push emigration. The rural-poor can not afford to invest in international migration due to the cost of information acquisition and transportation costs involved. Therefore, the rural poor who accumulate low levels of human capital are restricted to internal migration and receive lower returns on their investment compared to international migrants.

Contrary to this situation, the better-off people-- regardless of the source area's level of development or of potential migrants' rural/urban place of residence-- get pulled by economic or educational opportunities in urban or international

destinations. Because of their ability to accumulate higher levels of human capital, the better-off receive greater returns on their investment.

Bohning (1981) identifies three migration models used to explain the process of internal migration: the distance or gravity model; the probability or transition matrix models; and "the push-pull or cost-benefit models" of migration which he aggregates into one category. On the other hand, in her study of urban migration in the Philippines, Trager (1988) draws a distinction between the push-pull and the human capital (i.e., cost-benefit) models because each addresses different sorts of questions: while the first attempts to identify the "structural determinants" leading to migration, the other seeks to capture the "individual features" affecting decisions to migrate.

The push-pull is then a crude, largely economic, approach which continues to be used as broad research guideline (Diamantides and Constantino 1989), albeit known to be deficient (Bohning 1981; De Jong and Fawcett 1981; Brown and Sanders 1981; Harbinson 1981). This model does not take into consideration the following factors: (1) technological innovations may make new lands cultivable or existing farms more productive thus decreasing resource-push migration; (2) many governments in LDC are actively introducing to their rural communities running water, electricity, health care services including hospitals, transportation networks and, in some cases, communications facilities. In other words, more rural opportunities are being made available, and the pull of the "bright urban lights" is, in some areas, fading; (3) economic hardship has to be correlated with a person's

propensity to move-- economic factors should not be separated from social ones² (De Jong and Fawcett 1981; Harbinson 1981). At a more fundamental level, economic pressures at the area of origin which are said to produce push migration are not matched by the need of economic opportunities at the area of destination. Therefore, to be economically pushed from an area will not result in migration if the person is not inclined to migrate, and if there were no pull factors at the receiving areas.

Despite that, Bohning (1981, 36) acknowledges that the "migrant can slip from the push to the pull category, or vice versa, which makes the distinction somewhat meaningless." After describing its underlying assumptions as "unrealistic", Bohning (1981, 36) argues that the push-pull model should not be discarded because if "one drops its pretensions of generalization, the model can, in strictly defined situations, provide respectable empirical explanations when applied to international migration."

2.2.1 The Development Paradigm and the Pull-Push model

According to the development paradigm of migration, rural to urban flow can be slowed by reducing the resource push in the sending areas. This can be achieved by (1) introducing land reform, (2) fertility control, and (3) frontier-oriented settlement (Brown and Sanders 1981).

However, land reform, especially when it involves land consolidation, eases the introduction of agricultural mechanization and of green revolution technologies.

² For example, during my field survey, I noticed that most families with a single son had decided against his migration regardless of their finances.

Although these factors increase the output per unit of land, they also increase the resource push and create a deficit of opportunities hence a surplus of rural labour. Concomitant with rural development is education which, in the context of the development paradigm of migration, creates urban-oriented skills, values, and attitudes. The combination of all of these factors stimulates cityward migration.

According to Becker (1976; 1981), in an economically developed area, the relative cost of raising children is high because the value of parents' time increases as agricultural activities (not necessarily productivity) decline, and child labour becomes less important in mechanized farming. Alternatively, the net cost of raising children is reduced when opportunities for young children are plentiful in a community practising traditional agriculture. Therefore, in modern farming communities, unlike in traditional ones, parents are having fewer children but investing more in them as each is perceived as human capital.

Although Sjaastad (1962) can probably be labelled as the "father" of the human capital theory of migration, it was Todaro (1969) and Harris and Todaro (1970) who pioneered its application in a Third World setting. They extended the human capital arguments into a risk-theoretic framework by including not only wage differentials of space, but also the probability and uncertainty of finding employment.

However, the theory's primary weakness continues to be the potential migrants' inability to accurately forecast expected future earnings almost casting emigration as an unlikely step for the cash-strapped, sometimes landless and risk-averse farmers in a less developed country. This "weak link" in the human capital

theory is dealt with well in Lucas and Stark (1985) and in Stark and Lucas's (1988) papers in which they develop the terms of an implicit insurance-investment contract between the potential migrant and his family whereby *the risks of migration are minimized through an insurance contract*.

While the human capital approach to migration views the individual as the decision maker and risk taker (Sjaastad 1962; Harris and Todaro 1970), there have been several studies where the decision to migrate is made by the family (Stark and Lucas 1988; Brown and Sanders 1981). The basic concept of migration as a *personal* investment is applicable in urban areas, particularly in industrialized Western societies. However, in agrarian-based societies, especially where the extended family dominates, migration is a *collective* investment made to benefit the entire family. In such settings, family members work together and make their living from the same resource, the land. So the emigration of a family member is a loss of one unit of labour which could have severe effects on family income and operations. In the traditional human capital approach, the unit of analysis is the individual who is not insured and bears the costs and benefits of his act. In the proposed hybrid approach the unit of analysis is the family which bears the investment and transportation costs, and insures the potential risks which a migrant may experience.

Having reviewed the human capital approach to migration and identified the links and common denominators between it and related models of migration, the following sections will elaborate on the theory of migration and remittances. Attention is then given to the issue of migration as an implicit insurance contract

between a family and its migrant members. There is also an attempt to answer the question of why implicit familial contracts are adhered to?

2.3 MIGRATION AND REMITTANCES: A THEORETICAL PERSPECTIVE.

The first conceptual attempt to understand why migrants remit was by Stark and Lucas (1988) which is in fact a more encompassing elaboration of an earlier paper (Lucas and Stark 1985). In their recent article entitled "Migration, Remittances, and the Family" they primarily address the question of why migrants remit.

Consistent with the human capital model, this new theory focuses attention on two components: *investment and risk*, where a family invests in a migrant to guard against the risks of future adversities. The enforceability of that voluntary implicit agreement is explained using an *altruistic model and a bargaining model* hence reducing or eliminating the need for costly contractual surety.

This thesis addresses the hypothesis that emigration may be treated as a family investment in an implicit insurance-type contract with the migrant, an investment with costs and returns for all family members, residual and migrant. In other words, the migrant in whom the family invests³ and stands by (insures) until established abroad is expected to reciprocate whenever adversity strikes its members.

³ direct investment in things such as education and transportation costs.

2.3.1 Migration as an investment against risk.

Rural crop failure (especially in rain-fed agriculture) is not an uncommon occurrence nor is an initial period of unemployment for urban immigrants. One of the most effective methods for mitigating such uncertainty in a family entails a family investment in building a dynamic insurance plan between it and its members thus allowing families to readily respond to nature's adverse and unexpected quirks.

In formulating their theoretical constructs on the question of "why do migrants remit", Stark and Lucas (1988) used the insurance contract approach, one that warrants defining. The essence of the ordinary insurance contract is the "payment of a fee by the insuree in exchange for the insurer's promise to pay a certain sum of money provided a stipulated event occurs" (McCall 1987, 869). Using this concept is appropriate for understanding migrants' commitment to their families because insurance is, by definition, an

"institution that mitigates the influence of uncertainty. The individual invests in a host of activities *now* to insure that the timing and magnitude of unfortunate future events will be less harmful. These activities enable firms and individuals to trade risks among themselves" (McCall 1987, 869).

In Stark and Lucas's (1988, 466-467) theory, the family is initially the insurer after which roles are switched where the now established migrant fills that role. Their fundamental assumptions are: (1) The sending family desires to adopt a new production technology in agriculture; (2) both the head of the household and the potential migrant are averse to risk; (3) neither one of them is able to sufficiently self insure; (4) and neither of them can make "insurance-type arrangements with a

third party".

This theory states that migration of a family member is implicitly insured by the head of the household, the insurer. The new migrant, the insuree, will incur costs of transportation and urban living, and risks of failing to rapidly find (and maintain) urban employment. Such potential and temporary costs, which take the form of rural to urban remittances, are borne by the family until the migrant is established. Therefore, in the first stage of the migration process, family capital is initially invested in an insurance contract with the migrant who is entitled to make claims in adverse events such as unemployment spells; and later the family expects remittances as a return on its investment, or as a delayed payment for its provision of the insurance coverage.

As the new migrant becomes established and begins to remit, the head of the household in the sending region will then be able to adopt new high-yield agricultural techniques in spite of their normally deterring high-risk content. At this stage when the insurer head of household begins to reap the benefits of his investment he now becomes the insuree. At all stages of this cycle, this voluntary cooperative contractual arrangement is seen to benefit both the insurer and the insuree. Stark and Lucas (1988, 467-468) conclude that urban to rural remittances are a

"delayed payment of a premium for the insurance taken up by the migrant in the first period and/or as a transfer of the insurance payment to the head of the family once the rural unfavourable state of nature has occurred".

which includes cattle disease, crop failure due to drought or flood, price instability and market accessibility especially in war times, insecurity of land tenancy and other

threatening aspects of farming in a LDC. In other words, migration can be viewed as a diversification of investment in the presence of risk.

2.3.2 Contract Adherence

Contracts are usually the result of bilateral negotiations and are intended to insulate contracting partners from long and short external shocks. According to Rosen (1985, 1145),

"A contract is a voluntary ex-ante agreement that resolves the distribution of uncertainty about the value and utilization of shared investments between contracting parties."

Contract fees and benefits which are paid by contractants conditional on "information observed by both parties," are made of (1) "implicit payments of insurance premiums by workers in favorable states of nature" and (2) "receipt of indemnities in unfavorable states" (Rosen 1985, 1145).

Rosen (1985) asserts that implicit contracts must be interpreted in the "as if" sense of explicit contracts. For example, in implicit contracts between parents and their children, the former invests in the latter in return for an "implicit promise" of support during old age. Such an "as if" written but in reality unwritten contract is enforced imperfectly by social sanctions, through intra-family altruism and bargaining. The self-enforcing nature of implicit family contracts, and family members commitment to remit, have been commented on by many, notably Becker (1981), Becker and Tomes (1986), Pollak (1985), Stark and Lucas (1988), Lucas and Stark (1985), and by Philpott (1968; 1970). One of the questions that their work illuminates is: why are implicit (family) contracts voluntarily honoured? The answers

that emerge revolve around altruism, bargaining, and self-interest.

2.3.3 Altruism

Altruism and loyalty are a major integrating and binding force within a family. An altruist is defined by Becker (1981, 177) as one who is made better off reducing his own consumption in order to increase the consumption of his family. Becker continues:

"Since family income is the sum of his own and his beneficiary's income, he would refrain from actions that raise his own income if they lower hers (the family's) even more; and he would take actions that lower his own if they raise her income even more."

To put it in migration terms, an altruistic migrant will not do anything that lowers his family's income⁴, and is also willing to lower his own income⁵ to raise that of his family. Therefore, an altruistic migrant would consider his family's welfare to have greater value than his own.

It was believed that family members honour implicit contracts that develop between them purely out of altruism⁶. For example, families invest in their children's education partly because they see it as being an essential capital for their children's future. However, many⁷ have observed, after controlling for wage levels, a positive

⁴ E.g., a migrant would recompense his family the costs of transportation and unemployment insurance.

⁵ E.g., through regular remittances.

⁶ I and many others certainly believed that. For more details, see Connell et.al. (1976).

⁷ See for example Johnson and Whitelaw (1974); Rempel and Lobdel (1978); Lucas and Stark (1985); and Stark and Lucas (1988).

relationship between a migrant's education level and the amount remitted to his family, a phenomenon which they interpreted as a repayment of the total amount (principal plus interest) invested by the family. Similarly, Lucas and Stark (1985) concluded that altruism as well as a migrant's self interest were the primary reasons for remittances.

2.3.4 Bargaining

Bargaining is the act of negotiation between two or more parties about the terms of possible cooperation, which may involve trade, a joint business venture or other arrangements. Therefore, when a family bargains with a migrant sibling regarding the flow of remittances, that act is *contrary* to altruism. The relationship between altruism and bargaining models is stated by Lucas and Stark (1985, 906) in the following way:

"Within a game-theoretic view, greater wealth of the family should increase its relative bargaining strength. Thus whereas the pure altruism model predicts higher remittances to lower income households, *ceteris paribus*, the reverse is implied by the bargaining model."

In his study of the effects of the industrial revolution on family structure in nineteenth century Lancashire, Anderson (1971, 131-134) asserts that due to urbanization and industrialization, children had greater economic opportunities and high enough wages for them to gain economic independence of their families. So children entered into "relational bargains" with their parents on equal terms and reached (implicit) agreements that were beneficial to both. Commitment to this agreement or relationship was not strong thus if a better alternative was possible

elsewhere the child could take it. In traditional largely rural communities where the land is the only viable source of income, the children's position in the bargaining game is weaker because of their total dependence on the head of the household's income.

In his bargaining model, Pollak (1985, 600) identifies strategies that are equivalent to "payoffs associated with clearly defined "next best" alternatives for each party"; they usually correspond to "the expected utility taken over some set of alternatives". Do such alternative strategies affect intrafamily allocation and distribution of resources (or of human capital investment-insurance)? In other words, do Pollak's strategies lead to higher returns associated with the "next best" alternative hence investment in and "emigration of the fittest"?⁸

Bargaining models clearly put the issue of intrafamily allocation and apportionment in a game-theoretic setting. The contracting parties use their bargaining power in pursuit of their self interest. The outcome of the bargaining process, according to Stark and Lucas (1988, 471-472), reflects relative bargaining powers of the contracting parties. The bargaining power of each party depends on: (1) the utility with which it can provide the other; (2) the cost it will incur in providing this utility; and (3) its willingness to risk a conflict. All of these factors allow one to predict migrants' propensity to remit and contractants' adherence to the

⁸ While this concept can not be tested here, it can be tested by monitoring the age-rank of migrants in each household and their level of education compared to remaining family members. In Middle Eastern societies, the eldest son is held in highest esteem and one would expect him to be the first migrant from his household. If the child with the highest education and the fittest is the one that emigrates, then it bolsters the argument that a family actually invests in the emigration of their children for reasons of self-interest. Naturally, we assume remitting siblings.

contract.

In the initial stages of the migration process, a family's bargaining position is at its zenith; it not only finances the trip but also provides the migrant with the necessary insurance against urban risks. The family invests in the migrant because they expect high returns due to the fact that they invested in the most likely sibling to succeed ("the fittest"); and due to the community-wide and family-specific socialization to remit and confirm one's family loyalty. Moreover, in the initial stages, especially when the migrant considers his urban job unstable, he is less likely to risk conflict with his family because he may have to "file for benefits." As the migrant becomes established, his bargaining position strengthens and he becomes less willing to offer concessions. When the head of the household undertakes risky activities such as a business or agricultural investment, he becomes more dependent on the migrant's remittances.

Family altruism and intra-family bargaining are the two essential elements in implicit contracts' enforceability. The following section addresses more specifically the theoretical reasons for a migrant's adherence to implicit contracts.

2.3.5 Default Deterring Factors and Self-Interest

As for the migrant in whom his family has invested, three default-deterring factors are identified by Stark and Lucas (1988): First, the migrant's aspiration to inherit his parent's wealth⁹; Second, migrants who intend to return to their home

⁹ During my field work, I noticed that some migrants appeared to remit more than their family's inheritable assets.

village, even for a visit, need to maintain a good relation with their residual family members who are instrumental at guaranteeing siblings' reputation (Stark and Lucas 1988; Lucas and Stark 1985; Pollak 1985; Becker 1987 and 1981). The latter --the only remittance-inducing factor that Philpott (1968) concurs with-- amounts to the provision of the social base which greatly facilitates the reintegration of returning migrants into their home community. Finally, the remaining family members can greatly facilitate a migrant's rural investment and its maintenance. These factors induce migrants to remit and abide by the family's (insurance) contract.

Over time, family constraints such as getting married or having children, and economic constraints such as unemployment or retirement will affect the level of remittance flow, sometimes bringing it to a halt. Another contributing factor to contract-breaching, according to Philpott (1968), is a migrant's adoption of a new reference group from whom individuals usually derive their "new" norms, attitudes and values, and the social obligations these create.

The slower flow of remittances is offset by investing in more emigrants, an act that has desirable effects on households. A new migrant increases his family's net income¹⁰ because there is now an additional source of remittances, namely the new migrant who also reminds the earlier migrant of the problems in the source country and of his waning obligations.

Therefore, the continuous flow of migrants and the maintenance of social ties

¹⁰ Assumes unemployment and unproductive labour before migration.

With more emigrants, family per capita consumption increases because the resources are then distributed amongst fewer members.

with fellow villagers abroad¹¹ act as continuing general reminder and social sensitization to migrants' obligations toward their families back home (Philpott 1968). It must be noted that Philpott (1968, 473) believes that "remittance obligation is rooted in the nature of the migrant's social network rather than in property considerations or legal or supernatural sanctions." This is not upheld by Stark and Lucas (1988) nor by Lucas and Stark's (1985) findings.

2.3.6 Insurance Contract

Unlike the various techniques used to protect many of the market investments, it is difficult to protect investment in human capital such as by ensuring a long-term demand for an acquired skill in a rapidly changing world. Protection against adverse future events such as crop failure, unemployment, illness or death of the primary bread winner can be provided by the family, the state, or by the market.

In advanced industrial societies the market and the state, besides the family, play a protective role against a range of potential adverse events. In the more traditional societies, the family is typically the sole provider of insurance or protection in accordance with implicitly agreed upon "contract" between all the family members. Contractants, brought together by the joint opportunity to reap returns on investments peculiar to their relationship, are required to bear risk and to temporarily subordinate their interest for future considerations and gains.

Family insurance benefits are typically in kind and sometimes require domestic rearrangements so that, say, a returning migrant (e.g., a failed migration

¹¹ Chain migration streams would imply greater continuous remittances.

attempt) and his family can be re-integrated to form a single residential unit. This may be quite difficult if the family is becoming nuclear¹².

Implicit self-enforcing contracts, especially between family members, do not have to be based only on verifiable variables (Carmichael 1989) such as cattle owned by the head of the household, or the migrants' salary. Non-verifiable variables, normally observable by only one of the parties of the contract, include a migrant's effort level to secure employment or his ability to save. That is to say, the size of the migrant's (and for that matter, the insurer's) bank account. Here again a second sibling helps in enforcing the contract.

2.3.7 Moral Hazard and Adverse Selection

When an insurance contract is struck under uncertain conditions, two problems arise: *moral hazard* and *adverse selection*. These problems are founded on imperfect information where insurees could opportunistically misrepresent themselves to the insurer (McCall 1987; Pollak 1985). By paying an insurance premium, the individual is in effect transferring the risk of a particular activity to an insurance company (the family) which can not costlessly monitor the insured. The transference of risk affects the incentives and behaviour of the insured (migrant), a factor central to the moral hazard.

When adversity strikes a migrant in need of assistance, the insuring family is not sure whether it is due to the insured migrant's carelessness or due to bad luck.

¹² An example of this is the orientation or evolution of family life in Christian Khirbit Kanafar. Families there are more independently nuclear than extended as reflected by good family ties with very few family members marrying and remaining in their parents dwellings. Frequent cooperation between family members on daily or seasonal activities is also fading away rapidly.

For example, a migrant may default on his familial contract and not remit "by working less energetically or by entering occupations with lower earnings and higher psychic income" (Becker and Tomes 1986, S10). The moral hazard can be reduced by demanding that the insured bears some of the costs upon the occurrence of an adversity. This can be done by limiting or denying support for the defaulting migrant.

The second problem is adverse selection which can be illustrated in the following example. Consider a used car dealership where cars of varying qualities are being exchanged. While customers and dealers rank the product (used car), only dealers can observe the quality of each car they sell. Without some device for the customers to identify good cars, bad cars will always be sold with good cars. Such a situation illustrates the problem of adverse selection. In a family setting, adverse selection occurs when an insuring family unknowingly bears the costs and consequences of its own action because it could not accurately observe a situation due to, sometime deliberate, obstructions to complete information. For example, the family's likely passionate and subjective evaluation of the potential migrant's capabilities, character, and loyalty makes it difficult to determine which sibling is likely to succeed¹³ (and not default). Families with migrant children are always gaining more insights and information about destinations, and from each other's experiences with their (especially defaulting) children hence better able to more

¹³. Khirbit Knafar's residents have higher levels of education and greater access to urban employment by virtue of the political system etc... feel no need to purchase family insurance. Besides, there are church organizations to look after the poor; the agricultural land is irrigated thus generating greater returns than non-irrigated lands in Lala; and there is a technical institute, a hospital, and a high school all of which make for more opportunities for the villagers both in Khirbit Kanatar and in other areas (particularily inside Lebanon).

accurately assess the potential migrant's chances for success at the destination choice. It must be noted that many migrants, especially those desiring to emigrate to more developed countries, can not maximize over an infinite number of choices largely due to receiving countries' immigration laws.

Family insurance was identified by Pollak (1985, 590) as having important advantages:

"First, adverse selection is limited because outsiders cannot easily join the family nor insiders withdraw. Second, information disparities between individuals and their families are generally smaller than those between individuals and nonfamily insurers. Proximity¹⁴ yields substantial monitoring advantages, permitting the family to assess health or intensity of job search more easily, economically, and accurately than the market or the state. Third, both family loyalty and cultural norms limit opportunistic behavior. Virtually every society condemns cheating one's family far more strongly than cheating strangers-blood is thicker than water."

In conclusion, it is appropriate to quote Ravenstein (1885, 226) who asserted that

"bad or oppressive laws, heavy taxation, an unnatural climate, uncongenial social surroundings, and even compulsion ... all have produced and are still producing currents of migration, but none of these currents can compare in volume with that which arises from the desire inherent in most men to 'better' themselves in material aspects ..."

2.40 SOCIAL NETWORKS, SOCIAL STATUS, AND EMIGRATION: A CRITIQUE

The underlying assumptions of human capital or economic theory of migration is that the potential migrant is a rational economically calculating person with a

¹⁴ In this author's view, such monitoring is possible of migrants in internal urban centres, but not of those in international destinations, especially if migrants are in developed countries.

number of destination options. Such assumptions have been tested, refined and criticized by many. One such criticism focused on the narrow economic perspective of this theory and its neglect of many social and political factors that could strongly influence migration flows.

The presence of family members, relatives or friends at a particular destination combined with interfamily communications are necessary preconditions for migration, often producing chain migration (Brown and Sanders 1981; Connell et. al. 1976; Stark 1982). The presence of friends and relatives reduce the monetary costs of migration as they provide the new migrant with the sustenance and shelter until he or she finds work (Greenwood 1970); the psychic costs of migration are also reduced by chain migration. The latter represent an important non-economic migration-inducing factor.

Because it is prohibitively costly for migrants to arrange for non-family insurance and to access information about a potential destination, especially from more developed countries, Stark (1982, 478) asserts that "migration should be expected to be, and often actually is, closely associated with the creation and utilization of social networks." Social networks and ties with fellow villagers and extended family members abroad were found to have the added advantage of acting as a "continuing general reminder" to migrants' about their obligations to their families back home¹⁵ (Philpott 1968).

While rural unemployed landless peasants may emigrate for reasons of

¹⁵ See the section on implicit "contract enforceability".

economic survival, other intangible factors such as the diminished social status as a result of being disinherited and landless (Kasdan 1964) increase the push factor by reducing the psychic costs and increasing the social benefits of emigration. For many, emigration is a temporary phase which culminates in migrants returning to their home villages with their accumulated fortunes (Philpott 1968), after which the re-establishment of "lost" status may occur. In many cultures emigration is viewed as a step toward social maturity, and returned migrants have more prestige as a function of their wealth relative to residual villagers, and are also perceived, according to Philpott (1968 and 1970) and Tannous (1941), as having had a socially valued experience.

As mentioned earlier, Stark and Lucas's (1988) paper constitutes the first attempt at a theory of why migrants remit. Although their framework is rooted in the individualistic theory of human capital, they recognize that the family as a whole invests in the migrant; ie. migration is *not* an individual act carried out for personal selfish reasons. Investing in the migrant is done to improve the productivity, returns, and security of the *whole* family. Despite the geographical distance that separate migrants from their families, they continue to be considered as active family members. This implicit undocumented investment is seen by Stark and Lucas as a mutually beneficial contract between the family and the migrant.

There are no reasons to doubt the appropriateness of this theory of "migration, remittances, and the family", nor its case study from Botswana. The theory is set in the Third World and is primarily concerned with (1) domestic or

internal rural to urban migration and hence urban to rural remittances, and (2) the institution of the family as a provider of economic security (through insurance-investment) first and social benefits later especially if the migrant desires to return. The question that arises here is about the applicability of this theory to international migration and remittances. Does the family play the same role as an insurer of the migrant even when the intended destination is, say, Canada or Sweden and not Cambodia or Sudan?

For the purpose of this discussion two types of international rural-abroad migration are identified: (1) Temporary migration which is restricted in this thesis to people's movement between less developed countries, and (2) permanent migration from less developed to more developed countries. The former is typically made by contracted unskilled or semi-skilled labourers or "target migrants" who migrate for a specified period of time for the sole purpose of improving their financial situation. Such migrants, unlike those to MDC, are rarely entitled to the social security benefits of the host society. They usually have pre-arranged employment contracts hence requiring no financial insurance from their families but feel tied to them since an emigrant's wife and children are usually not allowed to accompany the male head of the household.

The family can play a key role in insuring (in the form of rural to urban remittances) the migrant in the first stages of the process. Repeated access to the migrant is essential because families would rather respond to the specific requests or requirements of the migrant than to, say, provide him at the outset with a large

lump sum of money to secure him from initial adversities of migration. This is based on the assumption of the family's accessibility to urban areas nationally and abroad¹⁰. Sometimes migrants are from stressed countries or regions inflicted by wars, or by natural disasters such as droughts or monsoons, conditions that may slow or halt communications and the flow of information between MDCs and LDCs. Such conditions could disrupt the stream remittances between migrants and their families, and make it easier to breach family contracts and reduce or eliminate the need for family insurance.

The second type of migration has a direct application to the dissertation's case study and to the theory of remittances being critiqued here. Emigration from developing to developed countries has a different dimension and implications for the theory of "migration, remittances, and the family". In such a migration pattern, two things are worth noting: the existence of social security systems in the receiving developing countries, and the prominence of chain migration. Both of these factors reduce the role of the family as an insurer and provider of social security.

Consider the following. A new migrant arrives in a developed country and fails to find a job or becomes unemployed before having the chance to get established. Who would this migrant turn to for support? He is likely to lean on the state for assistance. Short of that, the migrant would ask members of his own family or community (whom he may have known from the country of origin) for temporary help.

¹⁰ Many in Christian Khirbit Kanafar lamented about the difficulty of communicating with their migrant siblings abroad.

There is a *low* probability of a migrant requesting, from an international destination, financial assistance from his family. There are three significant reasons for his reluctance: First, financing a rural-abroad journey is far more draining on a family's budget than a domestic rural-urban trip. Second, the per capita income is usually far lower in developing countries than in developed ones. Finally, the cost of living in the developed world, particularly in its major urban centres, is much higher than in the cities of the developing world. This discrepancy in the cost of living is highest between rural sending areas and receiving ones in developed countries abroad. So while a family might be able to support a migrant in, say, the nation's capital city, most families will probably be unable to afford the cost of living in, say Toronto, Los Angeles, or Boston. It becomes clear that in the described migration pattern, a family would not (perhaps more accurately stated as *could not*) play the role of an insurer. Being perfectly aware of his family's finances, it is more likely for the migrant to request or accept assistance from his migrant friends and relatives (Greenwood 1970) than from his parents.

Furthermore, chain migration, especially to a developed country, is the norm in many developing countries. Due to the high cost of transportation to international destinations in the "North", and the low levels of income in the "South", the first migrant is *typically* the one who finances the emigration of subsequent family members. Knowing these realities about migration to developed countries, is a "contractual agreement" struck between the subsequent migrants and their families? Do subsequent migrants remit to satisfy the contractual agreement between the

original remitter and the family? In short, why do international migrants to developed countries remit?

2.50 CONCLUSION

The human capital theory of migration is reviewed then used as the basis of discussion of the push-pull model and of Stark and Lucas's (1988) theory of migration and remittances in a family situation. While the former theory deals with the question of why *individuals* migrate, the latter theory gives greater emphasis to the question of *why family members remit*. Due to their common conceptual basis, these models create a fertile ground for the generation and testing of hypotheses. The only major "deviation" from the original human capital model is the adoption of the family/household as the unit of analysis in this chapter and thesis.

Stark and Lucas (1988, 465-466) conceived remittances to be a "part of, or one clause in, a migrant family's self enforcing, cooperative, contractual agreement" where both the migrant and his/her family expect to be better off with the agreement than without it. A thorough analysis of this model appears to reveal that it is more applicable to internal than international migration. This can only be tested in the analytical chapter. However, the following chapter provides the national setting for this study and the reasons that necessitated a field survey.

C h a p t e r T h r e e

POPULATION, MIGRATION AND THE POLITICS OF LEBANON: A BACKGROUND

3.1 INTRODUCTION

Lebanon is an Arab country located on the Eastern coast of the Mediterranean sea. It has an area of 10,452 square kilometres and is bounded to the North and East by Syria, and to the East by the state of Israel. The country's topography is made up of two mountain ranges, namely the Western¹ and the Eastern massifs which run through the country from North to South. The Western massif is more commonly known to Western scholars as Mount Lebanon, the traditional home of the country's rival Maronite and Druze communities.

The topography of Lebanon has affected its sectarian composition. Early migratory Arabs established Sunni and Shi'a Muslim villages in the Biqa'a valley, and the Maronites and the Druze chose Mount Lebanon for its relative safety (see Figure 3.1). The geography of the country and the different social and religious value systems dictated that these

¹ The northern "Al-Karna' al Sawda" mountain peak is 3000 meters above sea level.

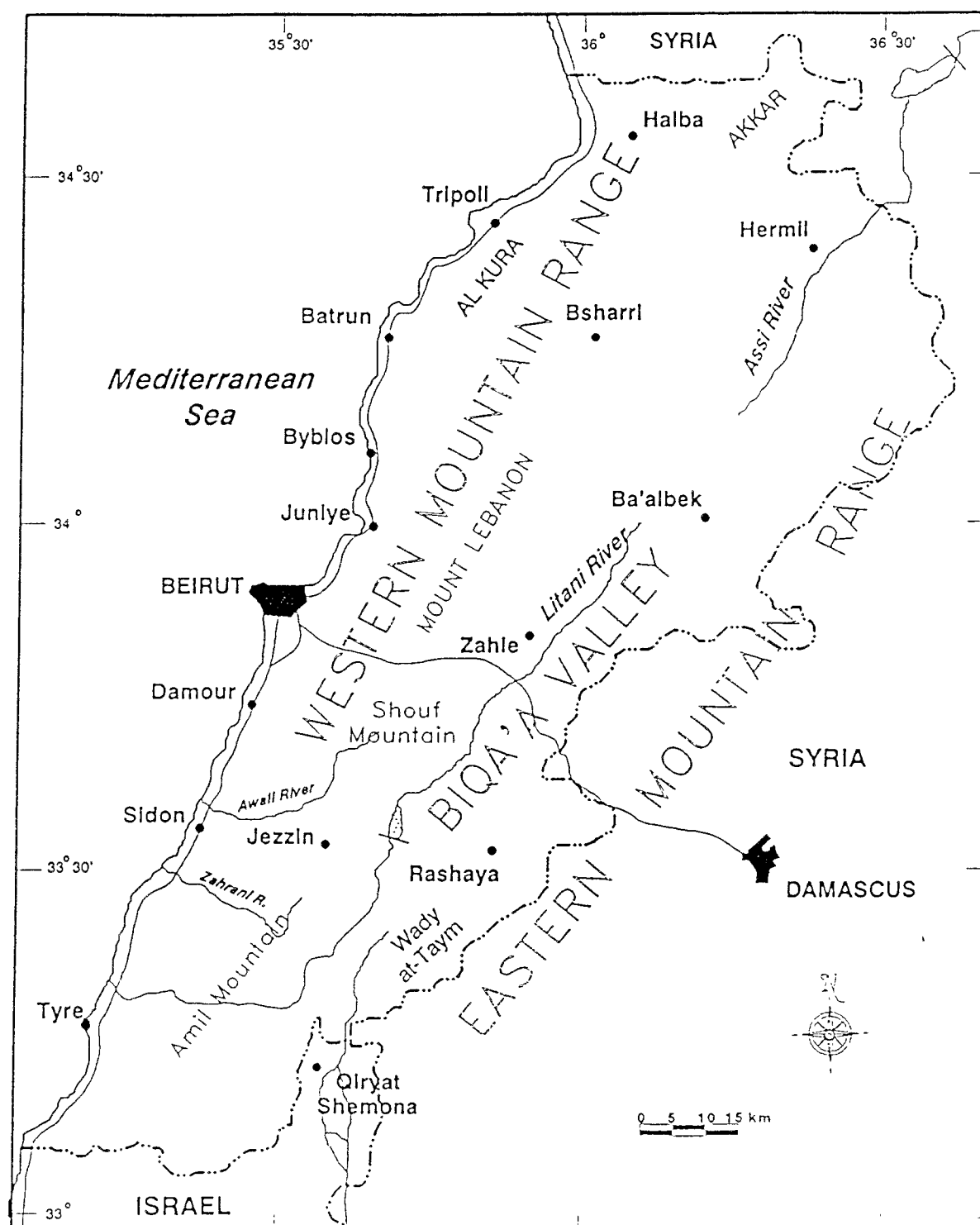


Figure 3.1 The Geography of Lebanon

communities live in relative isolation from each other until the middle of the nineteenth century.

This chapter sets the national scene and spirit for this research project. It starts by sketching the geo-sectarian structure of the country. This is followed by a discussion of Lebanon's National Pact, the formula that allocates political representation according to the size of each religious community. Special attention is given to the role of population censuses in the politics of Lebanon and how they affect the economic development of each religious community.

Also discussed are the issues of migration and remittances, and how the former constituted a partial prelude to the eruption of the 1975-1990 civil war. Finally, Lebanon's largest province, the Biqa'a, is discussed in terms of its population composition, followed by a brief discussion of village administrations.

It must be mentioned that population statistics (or the lack thereof) are at the heart of the political debate, therefore, almost all national population figures used in this thesis are estimates which vary sharply at times. Additionally, the Christian Maronites and the Shi'a Muslims make up part of the focus in this chapter simply because they are the two largest communities in which the former has a monopoly on power while the latter is demanding more equitable representation.

3.2 THE SECTARIAN GEOGRAPHY OF LEBANON

A general geographic description of Lebanon is not complete if it does not account for the geo-sectarian structure of the country, a phenomenon with paramount importance in Lebanon's political and economic geography. Lebanon's various religious groups have

historically occupied certain well-defined geographic areas which are the focus of this section.

Based on data from Rubenberg (1988), Toubi (1980), Chamie (1980), and Salibi (1988a), the sectarian geography of *modern* Lebanon can be categorized into four major regional clusters. The first covers the residents of the mountain range of Mount Lebanon which was itself historically and conveniently divided by the Ottomans into two areas: (i) That part of Mount Lebanon north of the Damascus-Beirut highway² is considered the traditional home of Lebanon's Christians, an area where the Maronites are the overwhelming majority (See Table 3.1, particularly Kisirwan and Matin). These communities fled persecution in their homeland in northern Syria in the fifth and sixth centuries and choose this part of Lebanon's mountain ranges for its ruggedness and, therefore, relative security. (ii) The southern region of Mount Lebanon, particularly the Shouf Mountain, is the traditional home of the Druze. They are an off-shoot of Shi'a Islam who settled this area in the eleventh century (See Table 3.1, particularly Shouf and Alay). It should, however, be noted that the Maronites are the absolute majority in the whole of Mount Lebanon leading some writers to overlook the Druze presence in this mountain. In spite of their political domination and economic successes, Lebanon's Maronites did not take to urbanization but remained largely a rural community (see Table 3.2).

The second cluster is the Northwestern region which extends from the coast to the peaks of the Western mountains. It includes Tripoli, Seer and Akkar, and has a population

² The area north of Beirut, south of Tripoli, and the western slopes of Mount Lebanon make up approximately the current area of what some call the Christian canton/enclave, or "Maronistan".

that is largely Sunni. It should be noted that the Sunnis have always been an urbanized³ community with some major concentrations outside this region. In other words, the cities of Beirut and Sidon have a sizeable Sunni population.

The third area is the Northeastern region which includes the eastern slopes of the Akkar mountains, northern Biqa'a, and the northern part of Lebanon's eastern mountain range. This region, in which the cities of Baalbek and Hirmil are also located, has a population that is mostly Shi'a Muslim.

Finally, the Southern region extends from the slopes of Jabal al-Shaik in the east to the coast of Sidon-Tyre in the west. Similar to the Northeastern region, this region has a predominantly Shi'a population. Once again, outside this region, namely in the southern suburbs/slums (see Table 3.2) of Beirut there exists a substantial segment of Lebanon's Shi'a community, most of whom emigrated from the largely rural governorate of South Lebanon.

While historically Lebanon's population is segregated along confessional lines, there are many cases where enclaves of different sects exist in different village or town clusters. For example, the Greek Orthodox towns of Kura are located in the largely Sunni Northwestern region, and the Maronite town of Jizzin is located in the predominantly Shi'a Southern region, a region that is also home to a community of Sunnis who live in the Kharoub area in south east Lebanon along the border with Israel.

³ For example, a 1971 survey revealed that 84% of the Sunnis live in cities of 10,000 or more people, compared to only 45% of the Maronites, 55% of the Shia, and 46% of the Druze (Chamie 1980).

Table: 3.2 The Confessional Distribution of Lebanon's Population
(As % of the Total Size of Confession)

Urban Population				Rural Population			
	Beirut	Beirut's Suburbs	Other Cities	Mount Lebanon	North Lebanon	South Lebanon	Biq'a'a
Sunni	30.2	9.7	31.3	5.9	12.2	0.2	7.2
Shi'a	18.1	32.2	12.4	0.2	0.0	21.8	15.1
Druze	26.8	6.4	17.5	47.2	0	0	1.8
Maronites	17.6	17.7	10.5	28.3	9.1	9.3	7.0
Grk. Orthodox	38.9	17.6	15.9	6.5	20	0*	0.8
Grk. Cath. and Armen.	26.4	32.8	11.9	9.1	0.6	11.3	7.5

Source: Rondont (1984, 27)
 * This is an inaccurate figure because there is large enough Greek Orthodox in South Lebanon (eg. city of Marj'ayyun) to entitle the sect a parliamentary seat.

Within this geo-ethnic context, the research area where Lala and Khirbit Kanafar are located is somewhat unique. Lala and a few other villages which are located on the eastern side of the Biqa'a valley have a population that is mostly Sunni. On the western side of the valley, Khirbit Kanafar and a few other villages are mostly Christian. Both groups of villages constitute a religious minority in the largely Shi'a region and province of Biqa'a.

This geo-sectarian distribution is political in its origin, since a given sect rarely concentrates in one region to the exclusion of others. According to Toubi (1980, 85),

"Lebanon's sects are scattered over the country in varying degrees. The Sunnis, the Maronites and the Greek Orthodox have the highest dispersion rate; the Shi'ites and the Druzes have the lowest. The majority of the Sunnis are found in major cities like Sidon, Beirut and Tripoli. The Maronites, once concentrated in rural areas in all parts of Lebanon, have recently begun migrating in large numbers to the cities" (see Table 3.1 and Table 3.2).

In spite of demographic, economic and political changes over the centuries, each religious community maintained its traditional geographic territory. Therefore, the Sunnis remain a geographically fragmented community concentrated in the coastal cities of Tripoli and Beirut (see Table 3.1); the traditional mountain dwellers and historic rivals, namely the Maronites and the Druze have been slow in responding to the urbanization process thus maintaining their domination over Mount Lebanon; and the once-neglected Shi'a community remained in its traditional territory, southern Lebanon and the northeastern part of the country.

It should be noted that while the old city of Beirut is dominated by Sunnis, the city has attracted many from most major sects, hence it has substantial representations from a number of sects (See Table 3.1 and Table 3.2). Having described how Lebanon's religious groups are geographically concentrated, the discussion now focuses (1) on how these groups have interacted in recent history, and (2) on how the population size of each sect affected its role in shaping the future of the country.

3.3 POLITICAL HISTORY

After the collapse of the Ottoman empire, Lebanon and Syria came under the French mandate from 1918 to 1946. On the 1st of September 1920, the French High Commissioner General Henri Gouraud issued a decree establishing the state of Greater Lebanon under a separate administration from that of Syria. The decree annexed to the autonomous province (*mutasarrifiyya*) of Mount Lebanon the coastal

cities of Tyre, Sidon, Beirut, and Tripoli as well as Wadi at Taym and the fertile Bīqā'a valley, the economic backbone of the new state (See Figure 3.1 above; Hourani, 1946; Kliot 1986; Salibi 1965; and Saliba 1988). As a result, the population composition of the province of (Mount) Lebanon was transformed in one decade: in the 1800s, the Maronites constituted over 50% of the population of approximately 300,000, the Druze and Greek Orthodox combined constituted about 25%, and the Shi'a, Sunni, and Greek Catholics made up the rest (Faris 1982; Wagstaff 1986). In the territorially expanded *mutasarrifiyya* of Mount Lebanon, Greater Lebanon's population of 450,000 in 1919 was increased by 150,000 people most of whom were Muslims, thus reducing the percentage of the Maronites in the *mutasarrifiyya* from 65% in the early 20th century to 29% in the new republic, with the Sunni and Shi'a accounting for 22% and 20% of the population, respectively (Harik 1985; Farsoun 1988; Farris 1982). Therefore, the Maronites almost lost their majority status in Greater Lebanon.

A leading historian of the Middle East, Albert Hourani (1988) asserts that with the creation of the modern state of Lebanon in 1920, there were at least two segments in the population with two views about the future of the country. On the one hand, the largely Maronite population of Mount Lebanon had its own vision. It was a homogeneous rural society embodied in the institution of the Maronite Church with a vision for an independent, predominantly Christian community.

On the other hand, there were the coastal urban trading communities which were predominantly Sunni Muslims with Orthodox and other Christian elements.

These ethnic communities mingled and coexisted peacefully, and they had a vision of weak and non-interventionist government to which they would have access and control over (Salibi, 1965; Harik 1968; Hourani 1988). These two views had to be harmonized in order for the new republic to survive.

As the French mandate period came to an end, some of Lebanon's Christians expressed their concern that the post-mandate period could threaten the survival of Lebanon as an independent country in the Arab world. As a result, the Christians demanded that France grant Lebanon a treaty enshrining and acknowledging the special relationship between the two countries. However, according to the Lebanese historian Kamal Salibi (1988a, 184), some Christians

"demanded that Lebanon be made a national home for the Christians under French protection, just as Palestine was to be made a national home for the Jews, leaving Syria for the Muslims to manage as they pleased "

Although the Sunnis of Lebanon were enthusiastic about the country's coming independence⁴, they articulated their excitement in Arab nationalist terms. This Muslim pan-Arab perspective frightened many Christians and spurred a debate about Arabism and Lebanism. Despite that, both the Christians and the Muslims

"were bound to agree that the country, once it became independent, needed to be managed and developed properly. ... Details regarding the sharing of power between Christians and Muslims in the Lebanese state should be worked out in a manner that would best serve this aim" (Salibi 1988a, 185).

Eventually, leaders of the Maronite Christians and the Sunni Muslims reached

⁴ i.e. Muslims were enthusiastic about the end of foreign occupation which was seen as a step toward pan Arabism.

a power sharing formula known as the National Pact or Covenant (*al-Mythaq al-Watani*). This oral Pact, of which there is no formal record, amounted to an unwritten gentlemen's agreement that augmented and superseded certain aspects of the formal Constitution of the country.

Conceptually, this pact was a sound arrangement as it saw the marriage of the visions that two of Lebanon's major communities had for the future of the country.

The pact asserted that:

"Lebanon the mountain of refuge and Lebanon the meeting place, rooted in its traditions but open to the world, with bilingualism or trilingualism as a necessity of its life; possessing stable institutions which correspond with its deep realities, an assembly in which the spokesmen of the various communities can meet and talk together, tolerant laws, no political domination of one group by another, but a kind of spiritual domination of those who think of Lebanon as part of the Mediterranean world" (Hourani 1988, 8).

The National Pact was operationalized along two paths: one path dealt with how to distribute political power internally, and the other with the political orientation of the country. The latter stated that Muslims should support the continued independence of Lebanon within the Arab family of states, and that the Christians should drop their demand for close ties with France. In essence, then, the National Pact aimed at the "Lebanization of the Muslims and Arabization of the Christians" (Edmond Rabbath 1973, 518 as quoted in Tabbarah 1979, 111).

An intriguing aspect of the National Pact was its formula for the distribution of political power: key security (directorate of public security), military (Army commander), political (the presidency) positions were preserved for the Christian Maronites. The Sunni Muslims were allotted the post of the premiership of the

government, and other government positions were distributed proportionately among the different Lebanese communities.

"The official theory embodied in the National Pact was based on the assumption that the Maronites could speak for the population of the Mountain villages, and the Sunnis for all Muslims" (Hourani 1988, 9). In its original form, the National Pact overlooked substantial minorities on the periphery such as the Shi'a who are mostly located in the Southern and Northeastern regions, and the Druze who are concentrated in Jabal Shuf.

Four years after independence and the official implementation of the Pact, the Shi'a were allotted the speakership of the parliament. For many years after independence, the post of the Ministry of Defence went to the Druze, and the Foreign Ministry to the Greek Orthodox.

According to the constitution (article 95), Christian-Muslim parliamentary representation and other key civil service jobs were to be fixed at a six to five ratio. This ratio was determined by the then historically set demographic realities.

3.4 THE POLITICS OF POPULATION IN LEBANON

Lebanon's first and only census which was taken in 1932 during the French mandate period "provided the demographic basis for the way in which Lebanon was run" (Kliot 1986, 207). The census arguably revealed that the Christians outnumbered the Muslims by a 6:5 ratio thus parliamentary and public service positions were based on this ratio. Each religious group's representation was based on its size in 1932 thus entitling the Christians to 54 parliamentary seats and the Muslims to 45 (20 seats

went to the Sunnis, 19 to the Shi'as, and 6 to the Druzes)⁵.

Salibi (1988a, 198) asserts that there is a general suspicion,

"even among many Christians, that it (the 1932 census) had been a rigged one, at least to some extent. From that time on, only official population figures, which were generally known to be heavily doctored, had been released by the Lebanese census department, to the head of which only Christians were appointed, and whose record were kept in secrecy."

Many other writers⁶ reason that the results of the French orchestrated 1932 census are dubious.

Why are the results of the 1932 census questionable? The short answer to that has to do with "who is a Lebanese citizen?" The Muslims in the late 1920s demanded a national census because they were convinced that they were a majority and wanted access to the top echelons of political power in the country. The French had a special relationship with the Maronites going back to the Crusaders and Louis XIV, and wanted to maintain this relationship with their Christian allies, even after independence. Eventually the Muslims' demand for a count of the country's population was satisfied, but with a twist. The Christians insisted that all Lebanese

⁵ Although the number of parliamentary seats allotted to each sect evolved over time, the Christians always had a parliamentary majority. The figures discussed here (54 to 45) refer to the arrangement that existed until 1989.

⁶ See for example: Schiff 1989; Beaumont et.al 1988; Wagstaff 1987; Kliot 1986; Farah 1983; Kechichian 1983; and Khalidi 1979.

Table 3.3 Results of Lebanon's 1932 Census

	(1)	(2)	(3)
Maronites	227,800 (28)*	33,243	261,043 (30)*
Greek Orthodox	77,312 (9)	12,963	90,275 (10)
Greek Catholics	46,709 (5)	9,893	56,602 (6)
Other Christians	45,125 (6)	3,236	48,361 (6)
Total Christians	396,746 (50)	55,335	452,281 (52)
Sunnis	178,130 (22)	4,712	182,842 (21)
Shi'a	155,035 (19)	3,390	158,425 (18)
Druze	53,334 (6)	3,478	56,812 (6.5)
Total Muslims	386,499 (48)	11,580	398,079 (46)
Jews	9,981 (1)	488	10,469 (1)
(1) People present or temporarily absent. (2) Emigrants maintaining their Lebanese nationality. (3) Total of columns 1+2; Officially used figures. * As per cent of total population. Sources: Khalidi (1979); Rondot (1984); and Wagstaff (1986).			

emigrants and those of Lebanese descent⁷ should be counted in the national census. A "compromise" was found whereby those emigrants who retained their Lebanese nationality were included in the census (see Table 3.3, column 3)

3.5 CONSEQUENCES OF A NEW CENSUS

A census in Lebanon is badly needed for, amongst other things, purposes of development and public investment. A census can easily be taken without registering the confession of the people. However, the Christians object to the very idea of a census because they fear that any form of census may reveal demographic facts that may not serve the interest of the Christian community. It should be noted that Muslims have demanded a new census more to show just how large a majority they now form than to have a better development plan for their areas, an attitude that frightened the Christians even more (Salibi 1988a).

The Christians' objection to a new census reflects their refusal to acknowledge the new demographic realities which have been tipping in favour of the Muslim community. One reason for this is the high level of Christian emigration, mostly to France, the United States of America, and to the Persian Gulf countries.

Another reason is education induced emigration. Farsoun (1988, 108-109) contends that

"the quantity, level and quality of education indicate a strong Christian advantage over Muslims, especially the Shi'a. The school system also reinforces French-Arabic bilingualism and bi-culturalism among Christians, particularly the Maronites, and helps alienate them from

⁷ Emigrant Christians of Lebanese descent who no longer held Lebanese citizenship were estimated to be 160,509 in 1932, and the Muslim total to be 25,285 (Khalidi 1979).

the regionally dominant Arab culture and its Islamic underpinning."

In short, Lebanon's educational system, which reinforces foreign linkages and dependence, promoted the Western-orientation of the population, especially among the Christians; encouraged cultural and economic schisms between the two major religious communities (Farsoun 1988); and further accelerated the process of emigration (Kubursi 1986).

Another factor in the changing demographics is the low birth rate among the Christians, and the much higher birth rates among the Muslims, especially the Shi'a sect (Schiff 1989). This is partly due to the education level of each sect where Lebanon's Muslims have in general a lower level of education and income than Christians. A 1971 survey revealed that Catholic wives typically had 4.4 years of schooling and non-Catholic Christian wives 5.2 years, whereas Shi'a women had an average of 1.6 years of education (Chamie 1980).

The changing demographics in Lebanon were coupled with calls for a national census which the Maronite community resisted and rejected (Salibi 1976). When the issue was discussed in the 1970s and 1980s, the Maronites evoked an old idea, namely their demand to include emigrants of Lebanese descent in any new census. According to Farah (1983, 79-80), Lebanon's

"Maronites came to insist that all those born abroad of Lebanese ancestry should be counted as Lebanese (citizens), even down to the third generation American, African, or Australian. The reason is in the numbers. More Maronites counted meant more government positions at home for relatives, particularly important because the overwhelming majority of early emigrants were Christian. It has been estimated that by this mode of reckoning two-thirds of Christian Lebanese are residents of other countries, indeed, third generation citizens with only

vague notions of the old country."

Rondot (1984) states that not only will the Maronites emerge as the largest community if emigrants are included in the population count, but also the Shi'ites will have a slight edge over the Sunnis. The Sunnis countered this proposal and demanded Lebanese citizenships for the mostly Sunni Syrians who came to Lebanon as workers decades ago, as well as the Sunni Kurds who had fled Syria, Iraq and Turkey. Another thorny issue is the possibility of issuing citizenships to Lebanon's 350,000 Palestinian refugees most of whom (80%) are Sunni Muslims. These impasses are yet to be resolved.

3.6 POPULATION OF LEBANON

As mentioned in the introduction, there are widely varying estimates of each sect's share in the total population of Lebanon. So while the respected Lebanese daily *An-Nahar* (Table 3.4, column 1) shows the rapidly growing Muslim population as constituting 61.6% of the total in 1975, Rondot (Table 3.4 : column 4) estimates it to be 51% in 1984.

In a similar vein, the population of Lebanon was estimated by *An-Nahar* (5 November, 1975) as being 3.258 million, by Kechichian (1983) as 3.02 million, by Faour (1985) as 3.8 million, and most recently by Levran et.al.(1987) as 3.1 million. It is worth repeating that Lebanon's sectarian distribution and total population size, as Levran et.al (1987, 286) note, are "uncertain estimates," estimates that are often done by "experts" holding certain political orientations that influence their data (See for example Aljozo 1985). Therefore, figures in Table 3.4 should be used as a general

guide with the knowledge that the general consensus of scholars is that the Shi'a community is by far the largest in the country⁸, and the Maronite community is on the decline due to emigration and low birth rates (Farah 1983).

In spite of fertility and emigration differentials between the various sects, the inequalities inherent in the Lebanese system of government (ie. the sectarian quotas set by the National Pact) has survived two violent tests, one being the 1958 crisis and the other is the 1975-1990 civil war. The former crisis, a quasi-civil war, jolted the system which remained intact except for a minor adjustment in the formula that now requires six Muslims for every six Christians in government appointments (Farah 1983).

After fierce battles in and around Beirut, Lebanese parliamentarians met in the Saudi Arabian resort town of Ta'if (1988) and ratified a modified version of the National Pact. They agreed to political reform that would equate the representation of Muslims and Christians in Parliament. While "Deconfessionalization is stated as an explicit goal" of the ratified Ta'if agreement, it, according to Norton (1991, 461), "effectively concedes the futility of any serious attempt to expunge political sectarianism in Lebanon ... (and) leaves no doubt that confessionalism is here to stay for some time to come."

3.7 EMIGRATION FROM LEBANON

⁸ There is a consensus that the Shi'a community, which has been growing at a phenomenal rate, is the largest in the country. Nabih Beri, the leader of the Shi'ite militia Amal was reported as saying that the Christians are down to 30 per cent. Mr. Beri who was quoted in the Lebanese daily *An-Nahar* (21 December 1987) said: "They (the Christians) have cut us from electricity--and we don't have anything to do except sexual procreation-- the Shi'ite sect has become 50 per cent and the Muslim total 70 per cent". This rather fanciful estimate reduces the Sunni and the Druze proportion to 20 percent.

Human migration has played a most significant role in shaping Lebanon's geopolitical and economic attributes. It is a factor that is often mentioned in passing (Rubenberg 1989) without any real attempt to understand its role in the evolution of events on the Lebanese theatre, especially those leading to the recent civil war.

3.7.1 Emigration, Civil Discontent, and War

In the early fifties, there were two factors that altered the social and demographic structure of Lebanese society. One factor, the creation of Israel, merely five years after Lebanon's independence, resulted in the settlement of more than 100,000 Palestinian refugees in various parts of Lebanon. Some of those forced migrants were skilled entrepreneurs who energized the process of economic growth by attracting foreign investment and companies to Lebanon. On the other hand, the unskilled Palestinians provided much welcomed low-cost labour for the industrial and agricultural sectors. Another outcome of the creation of Israel was the severance of southern Lebanon from its traditional market in the Upper Galilee (today's northern Israel), a development that forced many residents from the South to migrate to the centre, Beirut, seeking markets and jobs.

A second factor was the severance of economic ties between the newly independent states of Lebanon and Syria in the late 1940s. This forced inhabitants of northern Lebanon to migrate to Beirut, and to a lesser extent to Tripoli, and to develop economic links with these urban centres instead of their traditional markets in northern Syria.

These geo-political disruptions mostly affected the country's Muslim

communities who lived near the Syrian borders in the north, and near the Israeli borders in the south.

Unlike the Muslim community, the Maronites of Lebanon have a history of international emigration that dates back to the late 1800s when the predominantly Christian silk industry began to decline. Between 1900 and 1914, a total of 100,000 people (representing one quarter of Mount Lebanon's population) most of whom were Maronites, emigrated (Johnson 1983; Issawi 1982). The rural out-migration of the Christians continued until the late forties and early fifties, a period when nationalistic independence movements were at a climax. Most Christians emigrated to North America, Western Europe, and to Africa. Their emigration, which went virtually unnoticed, was viewed as an economic phenomenon and not as a political one (Kliot 1986; Toubi 1980).

The rural to urban migration of the country's Shi'ite community occurred at a later period than the Christian migration and had different consequences. This migration, as mentioned above, was prompted by the rise of the Jewish state, the severance of relations with Syria (and the Upper Galilee), and by the flourishing of economic activities in and the rapid expansion of urban centres. In the mid sixties, another push-factor transpired as Israel began to "retaliate" for Palestinian attacks on its territory. Israel retaliated repeatedly and sometimes with massive assaults on southern Lebanese villages forcing hundreds of thousands of the area's mostly rural Shi'a population to flee to Beirut, and less so to Sidon (Khalidi 1979).

Only a small proportion of these migrants managed to find employment in the

urban service or industrial sectors (Farsoun 1988, 124). The confessional structure affected the employability of the new urban immigrants. Johnson (1983) reports that the rural-urban Christian immigrants were quickly absorbed by government bureaucracy, the commercial and financial firms of Beirut. On the other hand, there was low demand for unskilled jobs and the Shi'a immigrants had to compete for public service jobs with the indigenous Sunni of Beirut. Moreover, most Shi'as lacked (1) the necessary level of education for service jobs, and (2) the financial resources to emigrate abroad or to set up their own business (Johnson 1983). This resulted in high unemployment levels, a surge of under-employment and in the formation of a large shanty town on the southern outskirts of Beirut, a place where Muslim urban immigrants lived and which was later known as the "belt of misery".

All these factors that affected the migration of the Shi'a community "did not gain momentum until the late fifties, sixties, and early seventies" (Toubi 1980, 95). According to Toubi (1980), the difference in timing of the Christian and Shi'a migration processes is important because while the migration of the former went unnoticed due to the prevailing nationalistic political ideologies, the migration of the latter occurred at a time when new political (socialistic) ideologies aiming at bridging the gap between the various segments of society. These ideologies which stress social justice, the need for a fair distribution of public wealth, and for development and modernization were to some degree adopted by the regime of Fuad Chihab. How was each sect affected by the changing economic and political environments

⁹ For example, by October 1977, it was calculated that there were some 300,000 (mostly Shia refugees) had fled southern Lebanon (*New York Times*, 2 October 1977).

throughout the sixties?

3.8 MODERNIZATION AND MIGRATION AS PRELUDES TO CIVIL WAR

The 1958 civil unrest in Lebanon is described by Salibi (1976, 7) "as having shook the country to its foundations", thus opening the way for some badly needed modernization of the infrastructure beyond the centre, Beirut.

In the late 1950s, Lebanon began to experience enormous urban growth (Table 3.5), especially in Beirut, as well as conspicuous growth in the coastal cities of Tripoli and Sidon. Despite the equal distribution of the population between the rural and urban areas that was reached in the late 1960s (Table 3.5), the urbanization process was having a rather subtle effect on much of the countryside hence the rural character of Lebanon was still predominant. According to Hourani (1988) and Farsoun (1988), 49% of the Lebanese labour force were engaged in agricultural activities in 1959, a proportion that contracted rapidly to reach 19% in 1970, and 12% in the mid 1970s. The contribution of agriculture to the gross national product fell from 20% in 1950 to 9% in 1974 (Owen, 1988). By 1975 some 40 per cent of Lebanon's rural population had left or been driven off the land, and 75 per cent of them had settled around Beirut (Toksoz 1986; Table 3.5). Therefore, within a fifteen year period, tens of thousands of Lebanese families had become unemployed and in some cases displaced peasants, a fact that resulted in a mass rural to urban migration, especially to Beirut. Because the population of Lebanon's hinterlands (the South and North) are Shi'a Muslims, they were the most to be affected by the declining importance of agriculture in the national economy, and by

the labour-substituting technologies that were being introduced throughout the sixties and at a more accelerated rate through the seventies.

When Fuad Chihab, the former army general became president of the Republic in 1958, rural to urban migration was taking place at a rapid pace. This phenomenon was exacerbated by the new regime's attempts to revitalize rural Lebanon. The government initiated a modernization program as a result of which the road network was extended to previously-isolated rural areas, publicly-funded schools were opened in numerous villages, medical centres or hospitals, and water and electricity were all being introduced to a growing number of remote communities.

Table: 3.5
Observed and projected
Population of Lebanon, in million
1950-2025

	Urban	Rural	Total	Beirut
1861			0.296	
1919			0.45	
1920			0.60	
1930			0.80	.18
1932			0.793	
1950	.33	1.12	1.44	.23
1955	.49	1.12	1.61	.33
1960	.74	1.12	1.86	.46
1965	1.06	1.09	2.15	.65
1970	1.47	1.00	2.47	.92
1975	1.90	.87	2.77	1.29
1980	2.02	.65	2.67	1.47
1985	2.15	.52	2.67	1.62
Projected Population Figures				
1990	2.48	.48	2.97	1.91
1995	2.82	.47	3.29	2.19
2000	3.13	.47	3.60	2.38
2005	3.43	.47	3.90	
2010	3.71	.46	4.17	
2015	3.99	.45	4.43	
2020	4.26	.43	4.69	
2025	4.53	.42	4.95	

Note: All figures are estimates and may vary widely (exception: 1932 census results).

SOURCES. *UN Prospects of World Urbanization*, 1988. Population Studies No.112. USA. Farsoun (1988); Farris (1982); Hourani (1988); Keyfitz and Fieger (1990) *World Population Growth and Aging*; Khalidi (1979); Rondont (1984).

The government's efforts backfired as it made many villagers and tribesmen in once-isolated areas more motivated to seek urban opportunities and a better way of life. The flood of emigration from rural Lebanon was primarily from the Baalbek region and from southern Lebanon, areas that had had almost no urban influence before 1958 (Salibi 1976). As a result,

"Around the coastal cities, and particularly around Beirut, suburbs mushroomed almost overnight, with slum tenements sometimes built to house village migrants on lands which were legally the property of real estate prospectors or of Christian monastic foundations" (Salibi 1976, 7).

Because the population of the principal sending remote regions was mostly Shi'a, the growth of the suburbs and shanty towns around urban centres, particularly in Beirut, had a predominantly Shi'a character. On the other hand, the rural to urban emigration of Christians had two general origins and destinations. Salibi (1976) reports that Maronite peasants from northern Lebanon emigrated to Tripoli, and those from central and southern Lebanon to Beirut (to a lesser extent to Sidon). Therefore, the late 1950s were the beginnings of a massive wave of urbanization which resulted, among other things, in the side-by-side growth of many urban Christian and Shi'a Muslim suburbs or shanty towns.

The rapid urbanization that was taking place in the late 1950s and 1960s was giving rise to social problems that the central government was ill-equipped to deal with. For example, immigrants to Beirut, Tripoli, and Sidon settled mostly in suburbs that were close to Palestinian refugee camps. Palestinians' support for Lebanon's Sunnis pro-Arabism (pro-Nasser) position in the revolt of 1958 alerted the country's

Christians of future trouble. Therefore,

"In the case of Beirut, the Christian Lebanese and the authorities noted with satisfaction the rapid growth of the Shi'ite element among the Muslim slum-dwellers, with the deluded conviction that the Shi'ite Lebanese were a natural ally to the Christians of the country, and were unlikely to make common cause with the Sunnite city folk, much less with the Palestinian refugees" (Salibi 1976, 10).

This attitude was rationalised on two counts: On the one hand, the three principal Christian political parties in Lebanon were having some success recruiting Shi'as to their ranks throughout the 1960s. On the other hand, the Shi'as were influenced by Iran, a country the Maronites then regarded as an ally.

According to Toubi (1980, 96),

"The Chehab regime succeeded in bringing certain public services such as water, electricity, roads, and schools to rural areas, but failed to establish state institutions capable of maintaining this trend. In other words, the adoption of social justice policies was not accompanied by a change in the political system which would have guaranteed their continuity."

In spite of the great influx of villagers to the city which left less than 17% of the country's population in rural areas, the political formula of political representation did not change. The rather rigid and unyielding electoral law (like the national formula for political representation) did not change thus forcing a citizen, regardless of where he or she lives and for how long, to return to the town or village of origin to be able to exercise the right to vote.

As a result of rural out-migration over the decades, the strict electoral law over-represented rural areas and kept people exposed to narrow political feuds

between villages, families and clans. If migrant voters were not bound to their village of origin, they would have supported those who would protect their urban interests and who would work to improve their working and living conditions. This would have likely resulted in the emergence of new political convictions and dogmas that would cut across sects, families and regions. The confessional structure of the country froze political loyalties and orientations in the 1940s.

The massive flood of rural immigrants to Beirut overwhelmed authorities and weighed heavily on the economic infrastructure leaving most of them unemployed and disgruntled. Therefore, Muslim immigrants to urban centres, especially to Beirut, tended to become unemployed or underemployed (Naser 1978).

In light of the above description, findings of a 1971 study (four years before the outbreak of the civil war) indicate that the Shi'a community was at the bottom of the socio-economic ladder when compared to other major religious communities¹⁰. What exacerbated the plight of the Shi'a was the 1973-1974 world recession which resulted in the repatriation of many migrant workers from the oil producing countries (and from West Africa), returnees who were better educated and wealthier than the local population. All these factors led to the founding of the political organization "Movement of the Deprived", from which the AMAL militia was created.

¹⁰ The findings of a 1971 survey of incomes of couples show that Catholics, mostly Maronites, had an annual average income of 7173 Lebanese pounds (L.L.), Druzes L.L. 6180, Sunnis L.L. 5771, and the Shia only L.L. 4532 (Chamie 1980). The same survey also reveals that while Christians tend to be in professional, managerial and technical occupations, the Shia in particular tend to be labourers or unskilled. Another finding of the survey is that while less than 30% of Christian wives had no schooling, 70% of Shia women fit this category

3.9 WAR AND MIGRATION: 1975-1989

A number of civil uprisings have marred Lebanon's history. There are three periods of extended civil violence: 1858-1860 Druze-Maronite war, the 1958 clashes, and the 1975-1990 civil war. Unlike other civil wars in the country's history, the most recent did bring about a significant change to Lebanon's population distribution. Khalidi (1979) estimates the first period of the civil war (1975-1976) resulted in the internal migration of 600,000 of the estimated 3.5 million Lebanese. More recent estimates (Faour 1985) reveal that in ten years of civil war (1975-1985) more than 2.5 million people were forced to flee their homes at least once. Some areas were more affected than others. For example, 80% of Beirut's population and 99% of its suburbs' population had to move at least once.

Population movements as a result of the recent 1975 civil war can be classified into a number of stages. The first stage occurred between 1975 and 1976 when at least 400,000 were estimated to have been temporarily relocated inside the country or emigrated. This period was characterized international migrations and more so by within-city migrations. That is to say, from east to West Beirut, and vice versa.

The second stage occurred during the 1978-1979 period when hundreds of thousands were estimated to have fled the South mostly to Beirut after Israel invaded, occupied and later established the so-called "security belt" in southern Lebanon (Khalidi 1979; Faour 1985). Migration here was mostly rural to urban in nature. The third stage occurred again as a result of Israel's 1982 invasion and occupation of two thirds of the country for the next three years. Emigration peaked

when Israeli troops surrounded Beirut for over one month in late August of that year forcing over 90% of the city's population and of its largely Shi'a southern suburbs to relocate or emigrate¹¹ (Faour 1985). This period is characterized (i) by mass internal (rural to urban, and urban to rural) migrations which were often temporary, and certainly (ii) by the international emigration of a large number of people as well.

A fourth and final stage occurred between 1988 and 1990 when Michele Aoun launched his "war of liberation" which brought widespread chaos and destruction particularly to the Christian enclave for the first time in over a decade. This resulted in a surge of emigration to proportions that were never matched at any time in the country's history. This migration was largely international¹² in nature and affected Lebanon's Christian community almost exclusively. Once again, one can only talk in rather general terms about the number of migrants and their destinations simply because there are no nation-wide accounting of the consequences of the civil war on the population, an accounting that may reveal undesirable results about a particular sect.

¹¹ ie. the emigration of over 850,000 people.

¹² Internal migrations were also prevalent. For example, many of Khirbit Kanalar migrants residing in the Christian enclave returned, if temporarily, to the safety of their village.

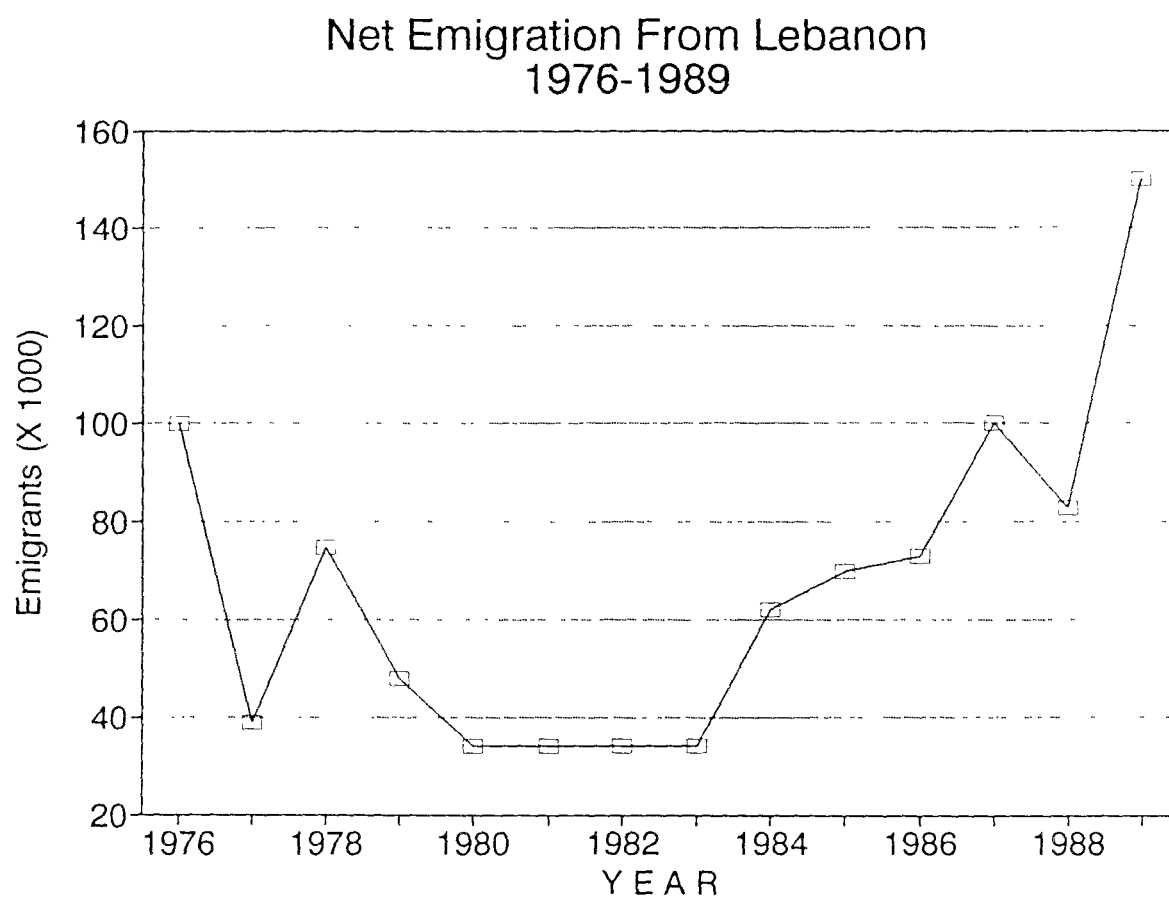


Figure 3.2 International migration from Lebanon

Source: Bank of Lebanon Statistics

Figure 3.2 provides a snap shot view of the four stages of international emigration. There is for example a peak on the migration curve in 1975-1976 (first stage), another in 1978 (second stage), no peak in 1982 (third stage), and a definite surge in international emigration in 1988-1989. While it is often possible to correlate a surge in fighting with a surge in emigration, the situation in 1982 was an exception for three reasons. Available statistics cover only international emigrants, and they do not explain the fact that during that time international emigration was almost impossible due to the closure of or inaccessibility to almost all Western embassies during the second half of 1982. Moreover, the closure of Beirut's international airport and other sea ports for an extended period made emigration almost impossible.

3.9.1 Confessional Boundaries

With the first spark of the civil war and for almost fifteen years after that, Christians and Muslims living in areas where they constituted a minority began to flee to areas where their co-religionists predominated. Therefore, areas of sectarian exclusivity expanded at a rapid rate during and after the many recesses in the civil war (Rabinovich 1984; Khalidi 1979; Kliot 1986; Salibi 1976). As a matter-of-fact, entire villages and towns were completely emptied of their original inhabitants, only to be occupied by those who were forced to emigrate from one area to another (Toubi 1980). For example, a total of 25,000 Christians fled the Maronite-Christian town of Damour and the villages of Jiyya and Sadiyyat after they fell into the hands of Palestinians and other leftists; later Damour was settled by Palestinians who had

been forced out of the camp of Tal al-Zaatar in Christian East Beirut (Khalidi 1979).

After considerable migration of Muslims out of Christian areas and of Christians out of Muslim areas, the boundaries of confessional regions or cantons emerged late in 1975 after "four rounds of fighting" (Salibi 1976). In many areas of the country that remained confessionally mixed, like the Western Bika'a administrative unit, relations between villagers of the dominant religion and those who are a minority (and perceived adversary) were somewhat uneasy and sometimes even tense, and overtly hostile on rare and short-lived occasions. For example, in the Western Bika'a administrative unit, there were isolated incidents of threat, intimidation, and sometimes murder of a person belonging to a minority sect in a particular village, usually if they were suspected of collaboration with an opposing militia.

On the other hand, a small number of young men from Khirbit Kanafar who cooperated with the Israeli occupation forces (1982-1985) were afraid for their safety after Israel withdrew from the area so they abandoned the village and fled to the Christian enclave. While relations between the two religious communities were on the whole cordial, the size of the Christian community in the predominantly Muslim villages of Karaoun and Jib Janeen (See Figure 3.3) was reduced as a result of "voluntary" emigration to the Christian enclave or abroad¹³. Those emigrants who did not sell their property in the home village, stayed in touch with friends and relatives in their village. Now that the dust of the civil war is settling, many are

¹³ A school principal in Khirbit Kanafar told me that "we (Christians of this village) feel like guests in the area".

reported to have returned including some to Khirbit Kanafar. Therefore, regardless of whether the migrations were urban to rural in nature, rural to urban, or within-city migrations, all the confessional groups were becoming more geographically concentrated. This gave greater credence to rumours of cantonization along confessional lines thus fuelling even further the process of sect-selective migrations. The fear of cantonization seems to have retarded the flow of remittances to and investments in certain areas where a potential remitter's sect is a minority in the area. Khirbit Kanafar is a good example of that (see Chapter five).

Having outlined the national context for the research in rather general terms, the discussion will now focus of the provincial and then village settings in Bika'a province.

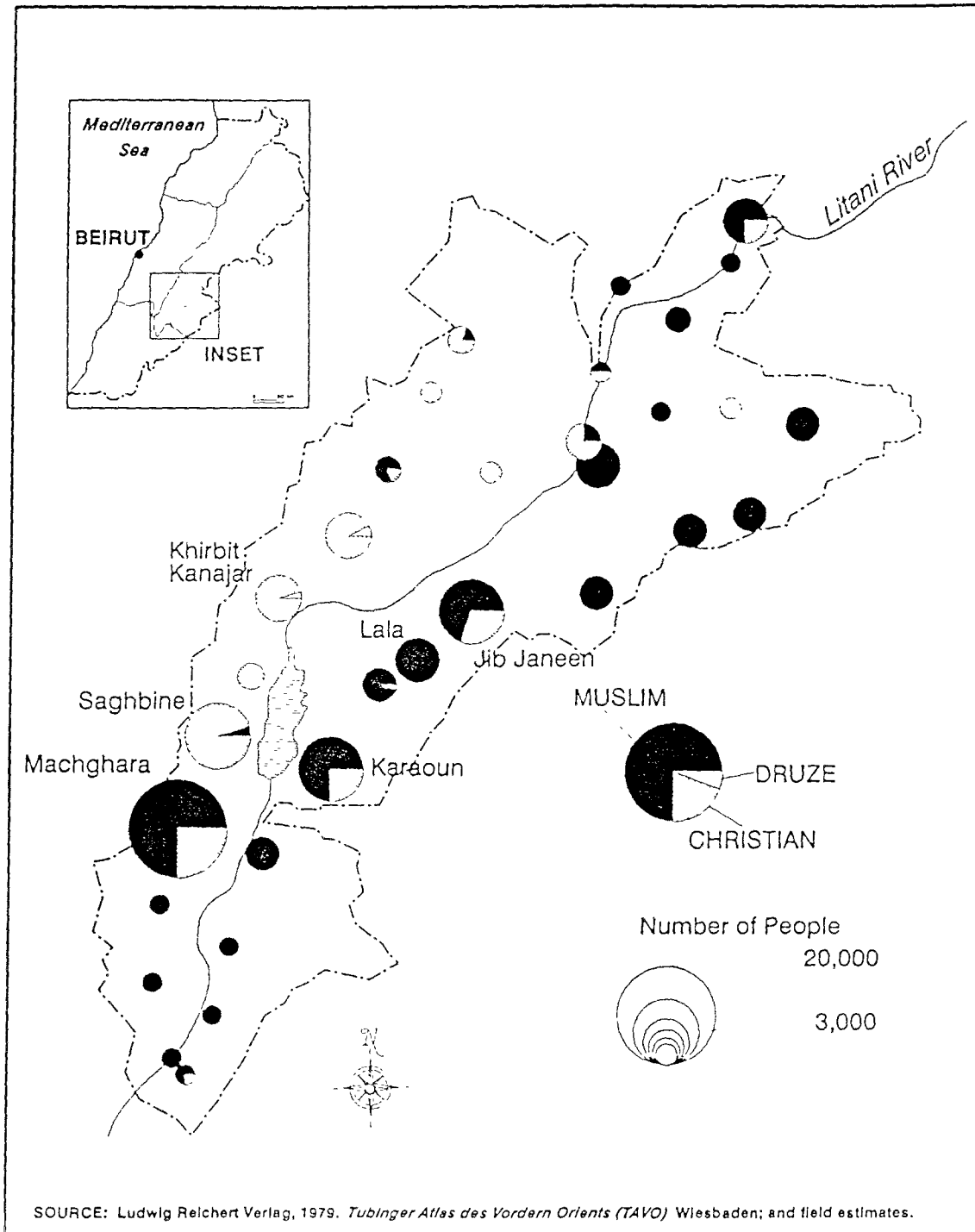


Figure 3.3 The Religious Distribution in the Western Bq'a'a

3.10 THE GEOGRAPHY OF THE BIQA'A

Lebanon has two primary agricultural areas: the coastal plain in the West, and the Biqa'a¹⁴ valley in the East both of which have the same North-South orientation as the mountain ranges. The villages under study here, Lala and Khirbit Kanafar, are located in the Biqa'a valley in the province of Biqa'a (See Tables 3.6 to 3.8). Geographically, the Biqa'a valley which stretches from northern Lebanon all the way to its south is 120 km in length, and 7 to 15 km in width.

The Biqa'a valley is 900 to 1100 meters above sea level. The valley floor rises northward from 900 m to 1100 m near Baalbek beyond which the valley floor begins to decline until it reaches 700 m near the cities of Hirmil and Al Qaa'. This explains the northward flow of the Assi (Orontes) river and the southward flow of the Litani (Leontes), rivers that rise from this general area. In the Western Biqa'a administrative unit, rain fall is about 650 mm per year and declines as one moves northward.

The productive part of the Biqa'a valley is around the cities of Baalbek, Zahle and Shtura, areas through which the Litani river winds and which are rich in fertile red soils that are mostly used for cereal, vineyard, and for orchard crops. By contrast, the southern Biqa'a is dotted with rocky outcrops and is not as fertile and useful for cultivation as other areas. The northern part of the Biqa'a, excluding the Baalbek region, qualifies as a desert environment with very hot summers and an annual

¹⁴ Biqa'a (plural) is said to be derived from the Arabic word Bu'qa'a which literally means spot. In the summer time, the Biqa'a valley is used for a variety of crops with different colours thus many colourful spots.

Table: 3.6 General Statistics About Lebanon's Provinces

	Area ¹	No. of Villages or Cities	Population	Density ²
North Lebanon	1981.15	489	524,387	265
Mount Lebanon	1950.40	636	1,227,991	630
South Lebanon	2000.58	415	486,780	243
Biqa'a	4280.28	333	284,107	66
Beirut	18	1	700,000	98,888
Total	10242.41	1847	3,223,265	

¹ Measured in square kilometres.² Per one square kilometres.

Source: Fadlallah (1986, 305-306).

rainfall of less than 200 mm.

The province of Biqa'a is Lebanon's hinterland and bread basket. However, as the table below shows, it is by far the largest and the least populated province in the country.

3.11 THE ADMINISTRATION OF THE PROVINCE OF BIQA'A

Lebanon is divided into six provinces: Beirut, Mount Lebanon, the Biqa'a, the North and the South which was recently divided into the South and Bin Jubail provinces. The creation of two, mostly Shi'a provinces (and a Ministry of the South), reflects the government's recognition of the rapidly growing demographic and political strength of the Shi'a community, and of the greater need to channel more public funds to better develop this long-neglected region.

The Biqa'a is Lebanon's eastern and least populated province where about 8.5% of the total population live in the largest province in the country which occupies 41% of its land area. Administratively, the Biqa'a is divided into three divisions: (1) The region of Zahle, the capital of the province, (2) the Western Biqa'a and Rashaya regions, and (3) the region of Baalbek.

These divisions are in turn broken down into five administrative units (*aqthi'a*, singular is *qath'a*): Zahle, Baalbek, Hirmil, Western Biqa'a, and Rashayaa. The administration of each of these units is based in the town or city having the same name as the *qath'a* itself, except for the *qath'a* of Western Biqa'a where Lala and Khirbit Kanafar are located. In recognition of the size and almost equal influence of the Muslim and Christians communities and in keeping with the delicate confessional

balance that is so prevalent in the public service, the administration of the Western Biqā'a is in the Christian town of Saghbin in the summer, and in the Muslim town Jib Janeen in the Winter.

The Western Biqā'a is the second smallest qatha' in area in the whole province after the urbanized qatha' of Zahle (Table 3.7). The former qatha' has the second largest density in the province after Zahle.

Although the qatha' of Western Biqā'a has a substantial area of irrigated land (22.2% of its total farmed area; see Table 3.8). Lala has very little land that is irrigated in comparison to Khirbit Kanafar. While the latter is irrigated by a natural spring and by artesian wells, Lala's (and a smaller part of Khirbit Kanafar's) farm land was supposed to be irrigated by the Litani river's land irrigation scheme the infrastructure for which was almost all in place when the civil war erupted in 1975. This plan appears to have been postponed indefinitely.

Table: 3.7

General Statistics About The Province of Biqa'a
Organized by Qatha'

	Area ¹	No. of Villages or Cities	Population	Density ²
Rashaya	541.06	36	16833	31
Western Biqa'a	467.25	40	39065	84
Zahle	413.68	56	113118	274
Baalbek	2176.46	132	102004	47
Hirmil	681.83	69	13087	19
Total	4280.28	333	284107	66

Source: Fadlallah (1986, 305).

¹ Measured in square kilometres.

² Per one square kilometres.

Table: 3.8

Irrigated and Rain-fed Land Being Farmed
in The Province of Biqa'a
(Land Area in Hectare)

	Rain-Fed	Per Cent	Irrigated	Per Cent	Total
Zahle	15,353	63.2	8,927	36.8	24,279
W.Biqa'a	15,772	77.8	4,491	22.2	20,263
Baalbek	65,393	85.8	10,819	14.2	76,212
Hirmil	25,326	94.9	1,372	5.1	26,698
Rashaya	19,375	99.3	128	0.7	19,501
Biqa'a	141,218	84.6	25,735	15.4	166,953
Source: Fadallah (1986, 133).					

3.11.1 Migration From the Bika'a

While it is argued above that the process of migration has been part of a prelude to a massively destructive civil war, migration also had some positive effects on Lebanon's national and village economies, especially in the governorate of Bika'a. The benefits of migrations were from remittances and from remittance investments.

Despite the collapse of the banking sector and of the postal service since the early years of the war, Lebanese emigrants found a number of ways to keep on remitting and especially heavily during violent surges of the war as was the case in 1976 and 1982-1983 (Figure 3-4). Recent events in the Arabian Gulf countries (the Iraq-Kuwait war) have meant the displacement of thousands of Lebanese migrant workers in that area hence the loss of remittances to the tune of US\$ 50 million per month (*Globe and Mail*, 30 July, 1991).

Except for a brief Syrian-Israeli encounter in the Bika'a valley in 1982 and Israel's subsequent three-year occupation of much of the Western Bika'a, the province as a whole, when compared to others, was perhaps least affected by the immediate destruction and chaos of the civil war. As a result, the province throughout much of the war witnessed an economic boom (especially in the construction sector) which was more prevalent in some areas than in others. This economic boom was a result of the migration of financial and human capital from Beirut and the South to the Bika'a.

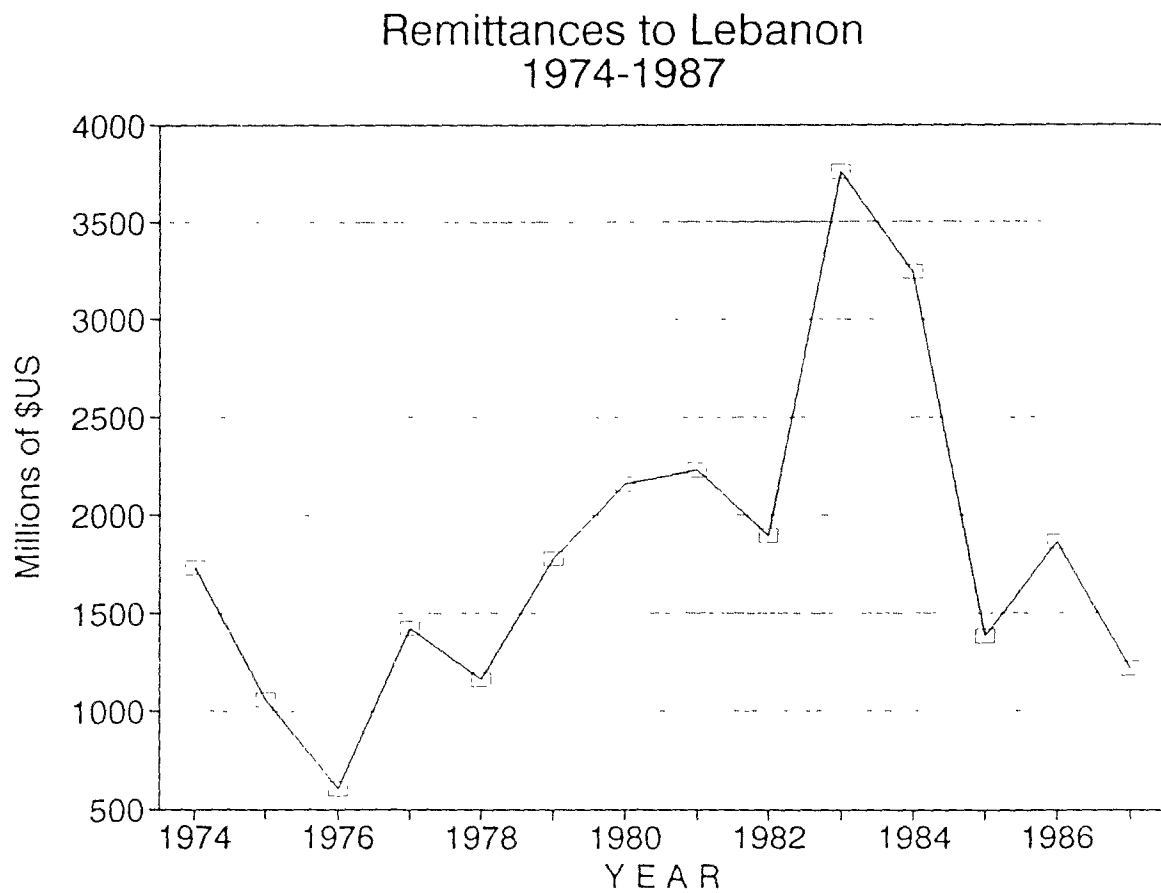


Figure 3.4 Remittances to Lebanon

Source: Bank of Lebanon Statistics (Quoted by Kubursi 1991)

The town of Shtura¹⁵ and the road east of it all the way to the Masna' on the Syrian border became the focal point for investors. Another reason is the deterioration in the value of the Lebanese pound which induced many emigrants to remit rather heavily not only to support their residual families but also to invest in their home villages (mostly by building luxurious houses).

Returnees also invested in commercial enterprises especially along the Shtura-Masna' area, and in institutional enterprises. A notable example of the latter are the investments of Abdul Raheem Mrad, a wealthy returnee who spent almost two decades in South America. He built the most modern high school in the Western Biqu'a administrative unit, perhaps in the whole province. Although its tuition is at least twice as much as most others in the area, this school remains popular (and expanding) because of its high quality of education, the large number of returnees, and because it offers a special program for the children of the returnees¹⁶. In fact the proportion of students from Lala is one of the highest when compared to students from other villages, thus reflecting not only high income levels in Lala and the success of its emigrants but also the high rate of returnees to the village. Mr. Mrad, who also built a centre for orphans, was recently chosen as the Sunni representative of the Western Biqu'a administrative unit in the national parliament. Therefore, by and large, the process of migration is having a positive effect on the

¹⁵ As Beirut became more and more dangerous to visit during the civil war, the town of Shtura grew in importance. For example, the late president of Lebanon Elias Sarkis was elected in a hotel hall in Shtura in 1976. Many top officials, both domestic and foreign often met in Shtura. Moreover, the Shtura-Masna' stretch of retail stores was the Syrian soldiers' last shopping stop in Lebanon.

¹⁶ For example, it has a program that can be dubbed: "Arabic as a Second Language."

economy of Biqa'a province.

On the local village level, emigrants were active in promoting the interests of their own villages. For example, there are Lala and Karaoun organizations in Canada and the United States. In the absence of a central authority capable of maintaining the basic infrastructure in the country, these organizations were active in raising funds for public projects. For example, Lala migrants (and to a lesser extent, the residents) donated tens of thousands of dollars and built a new mosque,¹⁷ purchased major parts for the local electrical grid, dug a water well to satisfy the village's domestic needs. In addition, returnees often undertake smaller but equally valuable public investments/donations. Some of the well-to-do returnees, whether in Lala or in other villages, while philanthropic, seem to harbour political ambitions on the village, provincial, and sometime on the national levels.

3.12 Lala and Khirbit Kanafar

Lala and Khirbit Kanafar are neighbouring villages in the qada' of Western Biqa'a. The population of each village is estimated to be close to 3000 permanent residents. Those in Khirbit Kanafar are Maronite and Greek Orthodox (and a very small Druze minority), and those in Lala are all Sunnis.

Being on the western side of the Biqa'a valley, Khirbit Kanafar is on a more direct road and is thus slightly closer to Beirut (65 kilometres away) than Lala (80 kilometres away). Both villages are about 1000 meters each above sea level.

¹⁷ One migrant living in Edmonton donated over \$50,000 to construct the mosque's minaret. The cost of the mosque is estimated at over \$350,000 if the volunteered labour, land value, and materiel were to be factored in.

Residents of Lala and Khirbit Khanafar coexisted in harmony throughout the civil war. However, there were times of increasing militancy on both sides during various stages of the war. For example, during the three years of Israeli occupation, residents of Lala and the small Druze minority in Khirbit Kanafar itself spoke of the fear which they felt from the behaviour of some members of the pro-Israeli (Christian) Lebanese Forces. On the other hand, some Christians from Khirbit Kanafar and from other villages on the western side of the valley "voluntarily" moved either to the Christian enclave or left the country seeking what they perceived as safer havens. Therefore, there were periods of tension but never of open conflict.

The economy of both villages is dependent on agriculture. Almost all the crops in Lala are rain-fed while those in Khirbit Kanafar are irrigated, thus different types of crops are grown in each. Traditionally Lala farmers have grown figs and grape trees, walnuts, wheat and other cereals, all of which do not require irrigation. More lucrative are the water-dependent summer crops such as tomatoes and cucumbers which are grown by some farmers. However, traditional farmers in Lala have been moving away from labour-intensive crops such as cereals and investing some of the remittances in lucrative and labour-saving trees such as cherry and olive. On the other hand, Khirbit Kanafar is well endowed with water including the Khryzaat spring near which a hotel and restaurant are built. In addition to the natural spring, local farmers dug more than ten artesian wells thus developing an extensive irrigation network. Crops in this village are largely water-dependent, and farmers produce plums, apricots, persimmons, apples and other lucrative summer

fruits.

Despite their similarities in size¹⁸ and economic base, the infrastructure in Khirbit Kanafar differs strongly from that in Lala. For example, Khirbit Kanafar has a high school, a trade school, a government hospital, a clinic, and a telephone system. All these facilities do not exist in Lala.

3.12.1 Village Administration

Village affairs in Lebanon are administered by two governing bodies based in each village or town. On the one hand, there is the *mukhtarah*¹⁹ which is a sort of village headmanship that was first introduced by the Ottoman Turks in the nineteenth century. According to a 1928 law, a community with a population of over fifty people or more should have an elected *mukhtar* and council. In villages of 50-500 persons, the council has two members; 500-1000, four members; 1500-2500, six members (Gulick 1955).

The person in charge of the *mukhtarah*²⁰, the *mukhtar*, is entrusted, among other things, with information on births, deaths, and socio-economic conditions of villagers, information regarded as so intimate that each sect elects its own *mukhtar* (Khuri 1972). The *mukhtar* and council serve the village without any salary.

On the other hand, the municipal council (*baladiyah*) is a form of local government which was also instituted by the Ottomans in the nineteenth century. The *baladiyah* is responsible for public projects such as roads and garbage collection.

¹⁸ Local residents in Lala reported that their village grew rapidly during the late 1960s and early 1970s. Before this period, Khirbit Kanafar was substantially larger in terms of population size

Because municipal projects are public, municipal councils tend to have representatives from the religious groups that exist in the village or town.

This chapter has provided a detailed national, and a brief provincial and village context for the research undertaken. It illustrates how the national sectarian differences and tensions, and the delicate confessional balancing act are prevalent in all levels of government. While migrations have been part of the prelude to the country's civil war, international migrations and the ensuing remittances have been a blessing for the country, Biqa'a province, and certainly for Lala. Perhaps now that the civil war appears to have ended, remittances and investments may again begin to flow to Khirbit Kanafar as the village's emigrants and residents may develop more confidence in their village and in the fate of the Christians in the administrative unit.

3.13 CONCLUSION

Although the war is over, the field work for this research was carried out during the ferocious "war of liberation", at a time when the country's Christians' (and by extension, the province's) were experiencing their most trying period of the entire civil war. Having set the national tone especially regarding the lack of population- and migration-related data, the following chapter sheds light on the contents of the questionnaire survey which was carried out at the height of the civil war in 1989. Although the local mood was apathetic, some distrusted and feared the returnee (the researcher) who was asking too many questions.

C h a p t e r F o u r

RESEARCH METHODS AND EXPERIENCES IN A WAR ZONE: A LEBANESE SETTING

4.1 INTRODUCTION

Official Lebanese government statistics have always been sparse. However, because of the great influence of each sect's population size on the political structure of the country (which is at the heart of current upheaval in the country), population statistics are non-existent.

In this chapter I discuss the challenges faced while collecting population and remittance data using a questionnaire survey in war-torn Lebanon. After explaining the reasons that made the use of a questionnaire survey necessary, its various components are discussed at some length. Later in the chapter I advance some hypotheses which are based primarily on the theoretical framework and others that are based on findings of previous researchers. Finally, because of the atmosphere of strife and instability, atypical problems arose, making it necessary to explain and express some of my field experiences in the first person.

4.2 QUESTIONNAIRE SURVEY REQUIRED

Carrying out a questionnaire survey in the selected villages was indispensable for two main reasons. The first is the absence of any previous statistics on remittances, almost all of which are channelled "unconventionally" (i.e., not through financial institutions). This was due to the fact that postal service to much of Lebanon was severed from the early years of the civil war, and the banking sector had taken a beating as well. The second reason for the survey is the lack of micro and macro-level data on Lebanon's population as so not to disturb the sectarian political representation (confessionalism) in the country which is based on the 1932 population size of each religious community.

In 1932, Lebanon's first national census was conducted under the auspices of the French mandate. It supposedly¹ revealed that the Christian Maronites were a majority and the Muslim groups were a minority. Political power was allocated accordingly and gave the former leading roles in politics (the presidency) and in civil service jobs, and the latter prominent (prime ministry and speaker of the parliament) but somewhat less influential roles in government.

For decades, officials preserved this system because they did not want to disrupt the environment of political stability and rapid economic growth in the country. Thus carrying out a new national census continues to be "strongly discouraged" because many believe that it would reveal a new demographic reality

¹ The results of this census have always been suspected to be inflated in favour of the Christian community, an issue that continues to be the subject of much debate and discussion. For more information see Wagstaff (1986), Khot (1986), Kechichian (1983) and Schiff (1989)

in Lebanon: the Muslim Shia group would be a majority, relegating the Maronites to minority status (Beaumont et.al. 1988; Drysdale and Blake 1985; Gordon 1983). Current population estimates are closely guarded statistics which are often inflated to favour a particular religious community (Schiff 1983).

It was clear that a questionnaire survey in the Muslim village of Lala and in the Christian village of Khirbit Kanafar was the only way of obtaining current data on the issue of population migration and remittances.

4.2.1 The "geo-sectarian" effects on research

War or political instability and sectarian tensions affect decisions regarding the research site and safety of access to it. Before entering an ethnically or religiously heterogeneous less-developed country, particularly if it is suffering from religious tensions, a researcher must be aware of and sensitive to the "geo-sectarian"² composition of communities to be studied, especially the levels of trust, cooperation, and interaction between them. The geo-sectarian composition refers to the spatial mixing or segregation of religiously or ethnically-diverse communities within a region in a country, as well as to the location of, say, religiously-specific communities relative to each other.

It is of great importance to be sensitive to the geo-sectarian composition of the sampled frame because it could: (1) influence the choice of research method and design; (2) dictate the choice of sample frame and sample size; (3) influence the type of questions to be asked; (4) adversely affect research results if such ethnic and geo-

² To my knowledge, this term is being used here for the first time

political factors are not considered; (5) assist a researcher in conducting him/herself in a conflict-ridden society; and (6) prove to be a "tool of survival" in a war zone. Geo-sectarian awareness and sensitivity allows the researcher to take appropriate (precautionary) actions to minimize potential dangers before and during the field season.

Rapid changes are not unusual in environments where war is being fought. Events in the field could force researchers to modify their planned approach and method. For example, an outbreak of violence in a distant area could send scores of people of a particular ethnic and religious group to the researched area thus burdening its economy, housing market, and swelling its population. Such happenings could greatly influence the results if the research approach was not designed to account for such developments.

4.3 PREPARING THE QUESTIONNAIRE SURVEY

In this section, terms used in the survey are defined, followed by some general comments about the preparatory work for the survey, and then a discussion of some specific questions that appeared in it.

4.3.1 Defining the Terms

The family was adopted as the basic unit of analysis thus the need to clarify exactly what is meant by this term. The act of remittance by an emigrant is regarded here as an affirmation of a kin's continued association with and commitment to the family. Therefore, migrant children become "simultaneously members of their parents' family and the family of which they are or will be parents, respectively

referred to as the family of orientation and the family of procreation" (Findlay 1987, 33). A married migrant may continue to be a member in both family categories simply by the continued pooling of his/her resources (through remittances) with the "original" family of orientation, although it is likely to be a smaller amount. While some of the questions in this survey are aimed at respondents' family of orientation, the majority relate to his/her family of procreation.

The concept of village is difficult to define because it can take a number of dimensions. One possible, readily quantifiable, approach is to use population size. This makes it relatively easy to compare national studies but not international ones because a Chinese or an Indian village is likely to be of a radically different size than one in Lebanon or Qatar. One can see that

"The word 'village' is translatable into most languages, although there are often problems of exact equivalents ... the characteristics are agricultural livelihood and production; geographical differentiation of habitation; geographical differentiation of rights in land; work places for most people within the same geographical differentiated boundaries as those of their habitation; small population size; a high proportion of internal transactions; and some degree of administrative differentiation" (Connell and Lipton 1977, 11-12).

To varying degrees, all of these factors exist in Lala and in Khirbit Kanafar making it quite clear that they are truly villages.

Emigration is defined as the absence of a family member from his/her village family residence for over one month. While this definition eliminates potential confusion with commuters and visitors to urban centres it includes, for example, migration for education and for marriage. This does not affect the objective of this

survey which is aimed at the effects of emigration and remittances on rural economies because remittances are considered a primary source of rural change. Although migrant students do not remit, those that do, if any, are likely to remit from countries with a standard of living much higher than that of Lebanon (eg., Western or oil-rich countries). Such cases are captured in the survey because the question asked is "do you receive any monies from abroad?". On the other hand, marriage migration almost always results in the emigration of a female to the male's place of residence, with the former remitting through the male to his family. Therefore, marriage and school migration will not affect the research because neither results in remittances.

Remittances are defined by most empirical and analytical studies as "personal income transfers directly associated with migration" (Standing 1984, 269). However, remittances do not have to be private and personal because there are many situations where migrant groups collect money that is sent back for the purpose of certain village projects as was the case in Lala. Such remittances and those sent for the purpose of building a home for the migrant son or for his family are accounted for descriptively³, not monetarily. The reasons are: family heads may have forgotten the exact amount received for the construction project; such money was received in a particular time for one project and is not likely to affect the family's economic status⁴; and Lebanon's currency have been (since 1983) going through severe

³ Questions whose answers were "yes" or "no".

⁴ It should be noted that a family's social status is elevated if a son builds a home in the village.

fluctuations in terms of its purchasing power and its value relative to the American dollar.

4.3.2 The Questionnaire Survey: A Discussion

Preparing the questionnaire survey was a laborious task that took months of work and consultations. While accessibility to Lala was assured, that to Khirbit Kanafar was not. Nor was there certainty about which questions might be perceived as unacceptable and offensive to the villages' inhabitants.

Parts of the survey had to be designed in a somewhat flexible style primarily because the likelihood of carrying out the research in Khirbit Kanafar could not be confirmed in advance. Therefore, crucial questions that I suspected as being sensitive were mailed to my brother in Lala who consulted with some friends, none of whom found them objectionable. Because there was no way of getting feedback from Khirbit Kanafar, I had to assume that there would be similar reactions to my questions in both villages.

The questions are largely quantitative in nature (close ended questions) and cover demographic, migration, and family economic status issues. The respondent was the head of the family who in both villages was invariably male, except in Lala where nine families were headed by a female. This was due to the husbands' temporary migratory trips to Brazil, Columbia or to Canada where they visited their child(ren), checked on a business which they had set up abroad for their child(ren), or worked for few months per year. The latter amounts to circular repetitive migration, a practice that appears to be gaining popularity among some families.

In a very few cases, the male "head of the family" was too old and ill to be truly running the affairs of the household. Out of respect and in keeping with traditions, he would be asked the questions with his wife or elder son present and who could volunteer an answer when they deemed it necessary. Once the male family head dies, the eldest son usually takes charge of family decisions and looks after his mother till her death.

After carrying out a small pilot survey of five families, some questions covering two time periods, 1989 and early 1970s were adjusted or dropped. It was difficult for family heads to recall their income or area of land used in a specific year fifteen or more years earlier. For this reason, the time period was referred to during the interview in a variety of ways such as: "the early 1970s", or "just before the civil war started", and more rarely, "when your son emigrated"-- if it was appropriate. All these reference points were considered more meaningful and realistic to the majority of villagers than: "How much money did you make in 1974". Therefore, land and income data from the 1970s should not be taken as firm or exact but rather as good estimates and approximations.

Table 4.1 Family of Orientation

1. What is your marital status (family role)?
 2. How old are you?
 3. What level of schooling did you reach?
 4. What is your full time occupation?
 5. Do you have brothers and sisters? ... If yes:
 - 5.1 How many brothers and sisters do you have?
 - 5.2 Where is each located?
 - 5.3 Those abroad, how long have they been there for?
 - 5.3.1 What was their level of education before emigration?
 - 5.4 What is the level of education of those in Lebanon?
-

Table 4.2 Family of Procreation

6. Do you have any children? ... If no, go to question ____:
 - If yes,
 - 6.1 How many sons do you have?
 - 6.12 How many daughters do you have?
 - 6.2 Where is each located?
 - 6.3 Those who are abroad, how long have they been there for?
 - 6.3.1 What was their age at time of emigration?
 - 6.3.2 What was their level of education before emigration?
 - 6.4 What is the level of education of those in the village?
 - 6.5 When your child emigrated, was he/she married or single?
 - 6.6 Who of your children is married and who is single?
 - 6.7 How many children does each of the married ones have?
 - 6.8 At what age did each of your children marry?
 - 6.9 Do your emigrant children visit the village?
 - If yes, how many times since emigration?
-

The question concerning a respondent's full time occupation (Table 4.1, question 4) was rarely asked because almost all respondents, if not retired, were in farming or in an activity related to it; occupations that did not qualify as a "full time jobs"⁵ due to the seasonality of work. Moreover, if one was not a farmer, the initial traditional introduction to the respondent would clarify just who he was. The introduction was often like this: "this is teacher so and so", or "this is engineer Mohammed Abu Nassif" or "this is so and so, the village butcher".

The education of siblings was intended to trace the level of migrants' education over the years, a variable that affects income levels and perhaps the propensity to remit. It also allows for a comparison between the two villages to test if the widely held belief that Christians are better educated than Muslims which would lead more urban opportunities for the former. Data related to the education of a respondent or of his/her siblings were recorded as years of schooling.

Inquiring about the location of siblings was a straight forward task in Lala where most resided abroad. However, many Khirbit Kanafar families have a long migration history to urban areas inside Lebanon. For example, some family heads work in an urban area where they lease (or purchased) a home, and they maintain a strong contact with the village where families spend a good part of the summer; two such families were interviewed in Khirbit Kanafar. Upon retirement, the parents typically return to the village while their children stay in the city and follow in their parents' footsteps by frequently visiting the village and eventually also retiring to it.

⁵ This foreign ("Western") phrase was rather vague to some and meaningless to others.

Table 4.3

Siblings' Employment

-
- 7.0 Was/were your son/s employed before he/they emigrated?
 7.1 If employed, where?
 7.2 If unemployed, did he/they actively seek employment?
 7.3 Would your son/s had emigrated (abroad) if he/they could have found a job
 in *the village* or somewhere else in Lebanon? Why did he/they emigrate?
 8.0 Are your migrant sons employed in their country of residence?
 8.1 If employed, what is their occupation?
-

Table 4.4

Family Income

-
9. Do you receive any monies from abroad? If no, go to question ____.
 9.1 If yes, from whom?
 9.12 Who remits most?
 10. How much money did you receive from your (*son*) over the last 12 months?
 10.1 How long was it before your (*son*) began remitting?
 11. Where do the remitters live?
 12. How frequently do they visit the village?
 13.0 To whom are the remittances sent?
 14.0 Who receives most of the remittances?
 15.0 How much of your income is generated in Lebanon/village?
 15.1 Domestic income of remaining family members?
-
- 15.0 How much do you make from agriculture?
 15.1 How much do you make from non-agricultural sources (apartment rents,
 business, trade etc.)
 15.2 How much do remaining family members make?
-

Therefore, to ask such a family head about the emigration age of his children, or about their marital status before emigrating did not make much sense. Finally, as will be seen later in this chapter, asking a family head in Khirbit Kanafar where his children were located often sparked controversial discussions.

Inquiring about a person's pre-emigration employment record (questions 7.0-7.3 in Table 4.3) was intended to probe whether the causes of emigration were related to the poor economy, the war situation or to other factors. The last of these questions (7.3) was open ended and gave the head of the family a chance to express his own opinion about the causes of his/her sibling's (usually son's) emigration.

Villagers have two sources of income: one is foreign (remittances), the other is local or domestic. The latter was broken down into income earned by the family head, and income earned by the non-migrant still-at-home children (Table 4.4). After the pilot survey, the question of domestic income was modified and broken into two categories, agricultural and non-agricultural income [see dotted box above]. This allows for the capture of the changing roles of each of these sectors in the economic strategy of a family over a fifteen year period.

"Where do the remitters live?" (Table 4.4) is an example of a redundant question that was dropped. It was based on the assumption that remitters may be other than the son(s) or brother(s) of the family head. The locations of the respondent's son and brother were usually known early on in the survey. On the other hand, the question of "who remits most?" was later determined to be somewhat unacceptable to respondents and subsequently dropped. Heads of families with more

than one remitting son abroad interpreted it as a request to evaluate or rank their children by the amount they remitted. A problem of comprehension and memory lapse arose with the question of when did your son begin remitting after arriving at his destination. It was obvious that respondents were mostly guessing at the answer rendering these data questionable. Moreover, there were many cases where families had more than one remitting son. Thus the initiation of remittances was not dependent on, say, the emigration of the second son. As far as the family was concerned, remittances continued to flow and family income was being supplemented with the first emigrant sibling; i.e., remittances are not perceived to have stopped and restarted with the emigration of each son. Finally, it is evident that all or at least the biggest portion of remittances are "always" sent to the family head (out of respect) who in turn distributes them amongst family members.

Table 4.5 Timing of Remittances

16.0 When do emigrants remit most?

- A. Summer/harvest season;
- B. Winter/non-harvest season;
- C. Economic difficulties in the country;
- D. Special family affairs (eg. weddings or ceremonies);
- E. Deterioration in security;
- F. Building family home;
- G. Renovating family home;
- H. Village projects (eg. village services, festivals);
- I. Other _____.

Table 4.6 Remittance Use

17. The money sent from abroad in the past 12 months, was it *intended* by its sender/s to be used for a particular purpose? (Give up to 3 uses, in order of importance)

18. What was the money *actually* used for? (Give up to 3 uses in order of importance).

19. Did the money from abroad enable you or other family members to do any of the following:

- A. Buy land
- B. Buy farm implements
- C. Improve land
- D. Buy pesticides, fertilizers, seeds, etc...
- E. Pay for schooling of family member
- F. Pay off debts
- G. Pay for migration of other family members
- H. Buy cow, sheep, goat, or donkey.

The timing of remittances (Table 4.5), particularly the seasonal aspect, was misperceived because it assumes that emigrants could send money to their parents anytime they wished. However, the civil war had brought new realities to rural Lebanese families: postal and telephone services to such communities were severed from the early days of the war thus remittances and information could be transferred only when migrants returned or visited the country. For example, most migrants travel to Lebanon in the summer and thus most remittances are received then.

In this category of remittance use (Table 4.6), questions were designed without reflecting on their cultural interpretation and implication. For example, although remittances from a son might implicitly or explicitly be sent to build a home for the remitter, the receiving parent might find it somewhat condescending for a son to tell his parent what to use the money for. Parents probably feel that while their migrant son continues to be a family member, his remittances do not diminish the role of the family head as the manager of the family's pooled resources. Therefore, almost every responding head of household said that he used remittances for whatever purposes *he* saw fit.

The breakdown of the various ways in which remittances may have helped a family was done after considering local methods of agricultural improvements. That is to say, farmers made a clear distinction between purchasing pesticides and fertilizers and purchasing agricultural machinery, despite the fact that they all increase agricultural production. Moreover, "improving the land" meant the building of terraces, deep machine ploughing, and in some cases the planting of orchards.

Table 4.7

Land Ownership and Use

-
- | |
|--|
| 20. How much land do you own? |
| 20.1 How much of that land do you use for cereals? |
| 20.2 How much land for trees? |
| 20.3 How much land lies fallow? |
-

Land ownership and land use data (Table 4.7) were required for the pre-war (pre 1975) and current (1989) periods, thus the question was asked once in the present tense, another in the past tense. There is an inconsistency in these figures for two reasons. Some parcels of land were still owned by the aging head of the family or were commonly held by all members of the family. The interviewee was sometimes a head of a family but still waiting for the passing down (inheritance) of his share of the land, parts or all of which he may have been using in the early 1970s. So a respondent who might have been farming 100 dunums⁶ of land in the 1970s, 30 of which was idle may be using his share of 25 dunums of land none of which were fallow. This illustrates some of the complexities faced when landownership and land use statistics are collected.

When attempting to capture the *effects* of emigration and remittances on the villages, the area of land in trees is a crucial variable which could indicate a shift in the agriculture of the village over time. Studies of communities with high emigration show that they experienced a conscious shift from labour intensive crops (e.g., cereal) to capital intensive, labour saving crops (e.g., orchards; For example, see Bilsborrow

⁶ Each dunum is almost 1000 m²

1987) .

Other questions, also dropped during the course of the survey, dealt with the number of days that each person (mostly farmers) worked in 1989 relative to the early 1970s. The questions were too detailed and seemed difficult to answer, straining the memory and patience of some respondents. These questions were of little theoretical value and not central to the study. Thus answers from a small number of families were sufficient to shed light on the work seasons and the time required to execute certain farming tasks.

4.5 THE NATIONAL SETTING: A BACKGROUND

Lebanon's protracted debacle over the past 15 years has made it a difficult country to visit and to live in, let alone for a Muslim Lebanese Canadian to conduct house-to-house interviews in a Christian village. One of the most intense and destructive periods of Lebanon's protracted civil war started in March 1989 and lasted until October of that year. Prior to that, the country enjoyed an extended period of relative peace during which violent outbreaks did not last long, and were mostly urban based. That gave many a boost of (in retrospect, "misplaced") optimism about the immediate future of that strife-ridden land.

While preparing for the research project and field season which took many months, the most vicious, indiscriminant and most spatially encompassing round of fighting had begun. As the war raged on, becoming more intense and spreading territorially, I had to make a decision whether it was still feasible to carry out my research project.

4.5.1 To Go or Not to Go?

Recent arrivals to Canada from Lebanon confirmed, in more detail, the news reports about the scope of artillery bombardment and its lack of discrimination. Previously unaffected towns and villages near the Lebanese-Syrian border were being hit, as was the main and "only" road leading to and from Damascus. Beirut's airport (Lebanon's only international air link) which has been used as an index of the ferocity of the war, had been closed since March 1989. Therefore, most travellers had to fly into Damascus and then travel overland to Lebanon.

These developments spurred my father to telephone me from Lebanon to suggest that I postpone my trip. That failing, he suggested that I stay in Canada for as long as possible, so I could change my travel plans if there was a "further deterioration in the situation"(!).

This was quite disturbing and marked a turning point in my thinking. For the first time I entertained ideas about alternative research projects on a variation of the same theme, one that could be carried out in Canada, perhaps on the Lebanese community in Alberta. Such thoughts were stressful and I felt that my doctoral programme was in jeopardy. When I suggested to my supervisors that I might have to abort my plan for field research in Lebanon, their reactions were supportive.

It is important to be as familiar as possible with the political and military developments in the country and region where a research project is to be carried out. This helps the researcher to independently assess accessibility to the region or community. While local guides are essential for the execution of the research project,

their view on security matters should not be unquestionably accepted. Locals tend to develop a degree of apathy and fatalism, especially in a protracted war. They also want to be polite, and appear hospitable⁷ by demonstrating just how quaint their community (and by default, their country) is. Moreover, locals may not be able to accurately assess their community's attitude toward "foreigners". Hence news gathering and decision making *initially* should be done as independently as possible.

Another important conclusion is that research plans should be flexible in terms of their design and approach. For example, while it was not possible to determine in advance the possibility of carrying out a survey in Khirbit Kanafar, I knew that I had a much better chance in Lala. Moreover, my supervisors and I were satisfied that studying this rather substantial phenomenon of emigration and remittances in Lala would be sufficient. One should be prepared to convert the research method (say, from a formal survey style to participant observer with many guided conversations). Moreover, one should take time to draw a rough plan for an alternative research project just in case the original has to be postponed or cancelled.

4.6 SNOWBALL SAMPLING

In the absence of a street map, a telephone book, or of any listing of village residents, and due to the constraints of time and the tense atmosphere of war, I had to use and be satisfied with what could be best described as a "random snowball" sampling approach. According to Simon (1978) and Sudman (1976) snowball

⁷ Hospitality is a very important cultural trait in the Arab world as a whole, especially in traditional rural areas

sampling is a method used when members of a universe cannot easily be located by random sampling or by screening, and where the members of a universe know other members of the universe. Thus information obtained from initial respondents leads to other members in the universe.

According to Sudman (1976), two major sample biases result from snowball sampling one is that a relatively "well known" person has a higher likelihood of being suggested as a potential respondent than does an isolated less-known person. Another bias develops if, say, one was to use a militia leader as a guide who would likely lead the researcher to others in his own particular group. Militia members may be atypical members of the community.

4.7 SAMPLE SELECTION: THE LIFE-SAVING FACTORS

After consulting many people, I was able to choose a sample frame. Resources, time and security considerations were sufficient to lead me to select a sample of two villages from one largely rural administrative unit in south east Lebanon. Moreover, the most influential factor in my choice of the villages and in undertaking research in Lebanon from the very beginning was the fact that I had excellent contacts. This was facilitated further because my parents live in Lala thus I was assured their assistance and cooperation. For example, before my arrival to Lala, they laid down the social ground work that eased the acceptance of my survey in the village, and I could count on free room and board.

I had to use my judgement in selecting Lala and Khirbit Kanafar for this research project. The constraints and limitations were many: a limited budget, a fixed

field season, and security concerns in the field due to sectarian sensitivities and Syrian "occupation" of two thirds of Lebanon. These reasons were most applicable to Khirbit Kanafar. Having good contacts in and knowledge of the area saves time, money, and perhaps life. So the more distant a person (especially a researcher) is from his/her contact's home turf, the riskier research and life becomes due to the distance decay of contacts' influence. This context strongly influenced the choice of Khirbit Kanafar as a counterpart to Lala

4.7.1 Why Lala and Khirbit Kanafar?

Well before I decided on my thesis topic, I was curious about recent migration-related developments in Lala. Khirbit Kanafar was chosen later for comparison purposes. I had visited my parents in Lala in the summer of 1987 and was amazed by the economic transformation underway in the village, a process almost totally attributed to remittances. The village was witnessing a building boom and a shortage of manual and skilled labourers which translated into higher wages. I then realized that most families had at least one migrant whose remittances were vital to their livelihood. The situation in Lala was more or less a replica of that in the neighbouring Muslim villages on the eastern side of the Biqa'a valley.

My choice of Khirbit Kanafar had a completely different basis. Khirbit Kanafar is a neighbouring village on the western slopes of the mountain ranges, opposite to Lala, and is about the same size as Lala. Agriculture is its economic base, it was said to have very few migrants, and quite importantly, it is a village, unlike Lala, where Christians are the majority. Khirbit Kanafar appeared to be

economically⁸ stagnant, reflecting the conditions in other Christian villages on the western side of the valley. Besides, doing a survey in Khirbit Kanafar was far simpler logistically, and safer physically, than choosing a distant (even Muslim) village.

4.8 LALA: MY FIRST INTERVIEW

To ease back into Lala's way of life, and to gain visibility and acceptance, I attended Friday prayers and then talked to worshippers. I also went to a wedding, attended a funeral, and socialized in the evenings with my brothers' friends or with relatives.

My father escorted me to visit the *Mukhtar*, Lala's village elder (LVE), and he told LVE about my research project. He did not want to see any documents confirming my university status and the legality of my research. After interviewing him he said it was not necessary to inform the local Syrian secret police in the area. I then interviewed the village sheikh, as well as some neighbours and relatives.

In the absence of official authorities who could legalize or refuse a researcher's entry, gaining the trust of the local political and religious leaders was essential. I hoped that they, as well as those who were initially interviewed, would disseminate positive accounts about my research.

4.8.1 Lala: Sample Selection

The sampling method employed in Lala allowed me to obtain a largely "random" unbiased sample representative of the entire village. This is made credible for the following reasons: (1) my father knows, at one level or another, most people

⁸ That gave me (and others) the initial impression that emigration was almost non-existent

in the village because he has what is perceived to be a "high status" urban government job, and he was then (1989) a member of the mosque-construction committee in the village; (2) my friends' and relatives' homes from which I sometimes started field surveying, are spread out in different neighbourhoods in the village; (3) one relative's home is next to the only mosque from which my father frequently invited worshippers from different parts of the village and from varying socio-economic classes to come over so I could interview them; (4) some samples were drawn from store owners, their customers, or more accurately put, stores' "wandering guests"; and (5) in addition to my father, my field companions were farmers, school teachers, students, and labourers.

In light of the above, potential spatial, social and sample selection biases were overcome because of the varying social status of my "guides"; my own influence over the choice of families to be interviewed when the guides were with me or when I was alone and because of the different locations from which sample sets were drawn. All this made the selection quite "random" circumventing any tendencies to concentrate on people of the same social or political orientation. The number of families interviewed was 125 (31%) (one was later dropped and there was one rejection) from a total of approximately 400 homes⁹.

I generally was well received in Lala because people there knew me and my family. In spite of that, some interesting remarks were made about my study and its objectives. For example, one respondent charged that my research "could reveal to

⁹ Most homes house only one family.

Canadian authorities that Lala residents are well off and do not need to emigrate." Another concern was: "By agreeing to the interview might put me at risk in Canada with the taxation authorities". This man happens to spend about half of each year in Canada earning an income by driving a taxi and not paying his share of income tax. I alleviated their fears and concerns by stressing that the information revealed would be absolutely confidential, and that my research was neither government funded nor related in any way to Canadian authorities.

4.9 KHIRBIT KANAFAR: MY FIRST INTERVIEW

Due to the minimum level of interaction between the two villages, Lala residents (including most of my contacts) knew little about their "neighbours"¹⁰ on the opposite side of the valley. Fewer than one dozen families from Lala exchange occasional visits, with friends (not relatives¹¹) in Khirbit Kanafar, and many children find summer jobs in Khirbit Kanafar as fruit-pickers.

After consulting people with friends in Khirbit Kanafar and with others in Lala, a consensus emerged. Since Lala's village elder (LVE) was a friend of his counterpart in Khirbit Kanafar, it was recommended that I ask him to introduce and recommend me to Khirbit Kanafar's village elder (KVE). The latter would then advice me about conducting research in his village.

¹⁰ This is explained when we consider that residences in both villages are located on the foothills of parallel mountain ranges which dip toward the valley floor where the Litani river marks the boundary between the two contiguous village farming land (ie. not residences). It is worth noting that there is no direct road nor a bridge connecting the two villages.

¹¹ In spite of the few friendships that have developed over the years, there are no inter-marriages between the two villages

LVE, two other "notables" from the village with acquaintances in Khirbit Kanafar, my father (who was instrumental in assembling this group), my brother (my driver) and myself paid a "high profile" formal visit to KVE. LVE introduced everyone and explained to KVE the purpose of our visit. Then I gave him an original copy and an Arabic translation of a letter from the geography department confirming my affiliation with the university and its approval of the ethics of my survey. The letter also briefly reviewed the objectives of the research and requested Khirbit Kanafar's residents cooperation. I made this request explicit by asking him about the possibility of carrying out a survey of heads of families in his village. KVE requested that I interview him at that moment while the guests were waiting. After the interview he said: "these questions are *non-problematic* to carry out in Khirbit".

I asked the KVE to recommend a local guide/contact person to ease our acceptance by the family heads to be surveyed. He declined because he believed himself to be the most appropriate person for the job. He had been a *Mukhtar* for twenty five years and knew every one in the village. He was politically "neutral" and widely respected (for his services to the people and for his age) in the village.

4.9.1 Khirbit Kanafar: Sample Selection

Most of the factors that affected the sample selection in Lala were also at play in Khirbit Kanafar. This was due to the respected position of the village elder, the distribution of his relatives' homes throughout the village, in addition to his position as a facilitator of government affairs in the village meant that he often had visitors or patrons at his house, people whom I usually interviewed. Unlike the situation in

Lala, having a car in Khirbit Kanafar was essential because of the topography of the village, the few ungraded roads, and the accompanying village elder who was 83 years old. I decided to terminate the survey after having interviewed 90 heads of households of the total of about 400 of Khirbit Kanafar's homes, 34 fewer than the number achieved in Lala. Based on the above, we had a relatively easy access to homes regardless of their location or of the family heads' political orientation. This sample may be somewhat more representative of one group¹² than of another. Unlike the situation in Lala, in Khirbit Kanafar I had to be respectful to the authority of KVE who was accompanying us in spite of some criticism and the suspicion of some villagers. I was not about to question his decisions of which families to interview.

The decision to stop after the 90th family head was interviewed was due to two reasons: One was the emergence of a definite pattern (ie. most migrate internally and most residual families do not receive remittances) which was further reinforced by each additional interview. Another more important reason was my brother's perception and mine of the danger we felt ourselves in due to the seemingly growing suspicion of some residents. On the other hand, my task was made somewhat easier because of one rumour alleging that I represented the Canadian government and was in town to recruit people to emigrate to Canada; a rumour which I denied immediately.

¹² The village has two dominant Christian sects, and less than 20 Druze homes.

4.10 INTRODUCING THE INTERVIEWER AND THE RESEARCH TOPIC

In Lala, family surveys were often treated as "visits". Every family was, at one level or another, known either to myself or to my companion or to both of us. Hence only in very few cases did I need to identify myself. However, I explained to potential respondents the nature of my research, what I would be using the collected data for, and the possible benefits of such research to the village and its residents. Therefore, the first part of my usual verbal identification was: "I am a doctoral candidate at a Canadian university. I am collecting data for my dissertation which deals with the effects of emigration and remittances on Lala and on Khirbit Kanafar".

Initially, such an elaborate and accurate introduction seemed essential and appropriate. However, being a "*doctoral* student" working on a "*dissertation*" was meaningless to most respondents, and somewhat mystical. Hence I set myself up to be perceived as part of the upper class "educated elite", an impression counterproductive in interviewing.

I later felt the need to adjust my introduction to potential respondents: "I am sent by a Canadian university to write a book about the village for which I need to ask you a few questions"; or "I am writing a book on the village and need to ask you few questions". That was both milder in tone, concise and comprehensible (a book versus a doctoral dissertation), and made for easier conversations with most respondents. At this stage, the amount of detail I gave in my introduction became dependent upon my perception or knowledge of a respondent's educational level, and

his/her attitude toward my request for an interview.

The second part of my usual introduction, in compliance with the requirements of McMaster University's "committee on the ethics of research on human subjects" included a statement informing potential respondents that my survey had been approved by this committee, and while I would appreciate their cooperation they "do not have to participate in the survey, and even if they consent to cooperate, they do not have to answer every question". This committee approved my research only after I convinced them that I would obtain informed, coercion-free consent from respondents, and will ensure that their privacy was protected. In fulfilling the requirements of the ethics committee so openly at the outset of the interview, I raised respondents' level of awkwardness and instilled in some, fear, suspicion and doubt about my "real motives" and the nature of the questions I intended to ask. Their reactions were uneasy, hesitant and sometimes sceptical: "there is nothing to hide"; "we'll see"; or "I'll tell you what I know". The ethical guidelines, while well intended, are ingrained in, and based on western values and traditions which may not be applicable universally. It later became evident that my detailed introduction to every respondent was unwarranted, especially when the cultural norms and values, and the political atmosphere are taken into consideration.

4.11 A MUSLIM RESEARCHER'S EXPERIENCE IN A CHRISTIAN VILLAGE

The *Mukhtar* of Khirbit Kanafar accompanied my brother and me and introduced us to the head of every family whom I interviewed. He followed the

introduction by saying words of praise about us and our family. Although most heads of families received us hospitably, a few were suspicious of us and our motives. The logic of their uneasiness was:

"So you are a Lebanese Muslim studying in Canada sent by your university to survey ('ask questions' in) our Christian village at this most explosive period of Lebanon's civil war. Besides, how did your university know about our village? Why don't you study some other Muslim village on the eastern ('your') side of the valley? Are the questions political or religious in nature?"

Fortunately such an attitude was not common. However, young heads of families, as well as families with young adult men, were sometimes doubtful, blatantly suspicious and clearly uneasy about my request for an interview. They would ask: "Is it an interview on the politics of the nation?" or, "are the questions religious in nature?" I would quickly assure them that they were not. After the interview, most of the doubters appeared pleasantly surprised by the non-controversial nature of the questions!

In most settings, suspicion of the interviewer's motives can be dealt with in various ways, usually without threat or harm. However, because of the atmosphere of lawlessness and mistrust caused by Lebanon's civil war, being "too nose" in the affairs of a particular ("opposing") community could result in bodily harm or even the loss of the interviewer's life.

While my impressions of villagers on both sides of the valley were more or less similar, my actual experience in Khirbit Kanafar revealed that "each area and type of respondents will have its own sensitive issues, things about which it is hard to ask questions at all" (Dixon and Leach 1984: 5). For one thing, I was a stranger

to the peasants of Khirbit Kanafar. For another, some of its politicized men in their late twenties and early thirties were likely active members of the Christian Phalange party¹³ who had to flee to the Christian enclave or emigrate overseas. Phalangist sympathizers and quiet members were more likely to have stayed behind. Some of the men who fled to the Christian enclave maintained strong economic and family ties to their village. In some cases the husband was living in the Christian zone while his wife and children were living in the family home in the village. So my routine question to the head of the family: "where do your children live?" sometimes triggered politically charged and chilling discussions about the Muslim and Christian militias' disagreements and running battle. Needless to say, my brother and I felt threatened and tried to remain non-partisan. Therefore, while the war environment created an understandable sense of bitterness and insecurity among some of Khirbit Kanafar's residents, I was in a situation where I needed to get answers to critical questions which I could not abandon.

4.12 SURVEYING IN A FAMILIAR TERRAIN

My first-hand knowledge about the culture, religion, politics and rural economy of the area made it possible to design research questions with relevance and applicability to both villages and to execute the survey in a sensitive and largely inoffensive way. According to Dixon and Leach,

"The formulation of meaningful questions for a survey depends on a

¹³ This should not be taken to mean that all of Khirbit Kanafar's adults were in one way or another involved with the Phalange party. While some were said to be "neutral", the true level of people's involvement is almost impossible to determine, especially by a Muslim outsider.

substantial initial grasp of a situation ... Understanding of the political and economic situation, and the historical background to it is essential (1984: 3)."

Having lived in Lala where my parents and relatives live gave me a good feel for the village, for the mentality of its peasants and for their agricultural way of life, not to mention an awareness of the nuances of their culture, their domestic politics, and their religion. Moreover, my parents and relatives subconsciously provided the social basis for the acceptability of my research project in Lala. My family's contacts in the village and the region gave me a sense of confidence about the possibility of conducting research in Khirbit Kanafar.

I later learned that what is appropriate for Lala may not be quite as appropriate for Khirbit Kanafar. My inadequate knowledge of Khirbit Kanafar, and the misperception of Lala residents of it made, for example, made some of my standardized questions inapplicable. Khirbit Kanafar, as it turned out, had many emigrants but was not at all affected by remittances¹⁴. Although the questionnaire survey was constructed to handle such cases, the result was that most interviews required half the time it had been taking me to do the same interview of remittance-receivers in Lala. In view of this, I added few open-ended questions on family farming and on respondents' reasons for not migrating as well as on Khirbit Kanafar's expatriates' reasons for not remitting nor returning to their village, all of which were unknown aspects of life there.

¹⁴ Remittances are assumed to be a major trigger of change and development in both villages.

4.13 DATA RELIABILITY

Some research allows a post enumeration survey to understand certain inexplicable points raised during the field season. Such enumeration was not possible in my study due to lack of funding, the sensitivity of some questions, the confidentiality of the data hence the anonymity of the respondents, as well as the tension created by the civil war. Resolution of inaccuracies was sought outside of the original survey by having informal group discussions with individuals who represented (either separately or jointly) all social, educational, and economic classes in the village.

My brother's friends are university-educated men in their late twenties who were born and raised in Lala. Hence they knew virtually every one in the village quite well. In order to save me the time and effort of interviewing all these families, they offered to give me detailed accounts about each one. I politely declined their "generous" offer and asked them instead to count the number of houses in the village and to estimate the population. Overall, they were a source of information about the village as a whole, and were a reference for cross checking and clarifying information obtained in informal conversations or during interviews. They were also a sounding board for my observations, perceptions, and ideas about the village and the region.

An interviewer must maintain curiosity and interest, spot inconsistencies and inaccuracies, and identify areas where further exploration is needed. Some of these problems can be minimized or eliminated by a carefully designed questionnaire with a provision for cross checking. If, however, incorrect or misleading data do creep in,

it is never permissible to estimate, "correct", or adjust the figures to the average. Rather, a qualitative approach to explain or understand the inconsistencies might be pursued. Hence, the reasons for the inexplicable results should either be investigated further or clarified in a footnote. According to Dixon and Leach,

"The principal danger for research is of superimposing inadequate knowledge or experience from elsewhere on data, and this is clearly most likely to occur when a researcher is new to an area" (1984; 4).

Moreover, knowledge of the political economy of Lebanon, of the intricacies of its politics and the role of militias in people's lives helped me not only to form relevant questions but also to understand and explain some of the discrepancies in the data. For example, there were some inexplicable cases where monthly expenditures of some Khirbit Kanafar families exceed their income. Such data should neither be rejected nor adjusted to fit some average. One possible explanation is that some Khirbit Kanafar men may be members in a militia group who receive monthly salaries, a fact which they would certainly not reveal, especially to an outsider. What is needed is further investigation (perhaps by an insider to Khirbit Kanafar) in an atmosphere of security and trust. This would require a longer contact period and the hiring of a local interviewer, both of which many researchers cannot afford.

4.14 SAMPLING FRAME

My sampling frame was imperfect because I did not interview any of the out-of-town labourers (Syrian) who were living, I was told, in Lala temporarily. They rented houses in the village, and were perceived as not being part of it. Villagers did not seem to know them well enough nor were they willing to accompany me for an

interview.

An area with a heavy outflow of seasonal migrants could bias a cross sectional survey taken in a certain season. However, seasonal migration in its true sense is non-existent in either village. Seasonal migration was quite prevalent in the pre civil war period when men from the villages, more so from Lala, would travel to "the city"¹⁵ twice a year: once after the seeding season, another after harvesting. In Lala, "seasonal migrants" are male heads of families who have returned from abroad, the wife and children stay in Lala while the father re-emigrates to work for few (6-9) months each year. On the other hand, those who once sought city jobs to supplement their incomes are now either abroad or in Lala receiving remittances and thus not in need of seasonal employment.

"Seasonal migrants" from Khirbit Kanafar have a greater tendency to migrate internally than those in Lala. This is due to easier access of Christians to public service jobs, most of which are located in Beirut. Another, more recent, reason for this internal migration are the tensions of war and the location of Khirbit Kanafar in a "Muslim sea". Hence internal migrants lease or own a home in the Christian enclave north of Beirut, and another in the village where they or their families spend their summer.

Currently, after harvesting, most of Khirbit Kanafar's farmers and some of

¹⁵ "The city" seems to refer to migrants destination anywhere along the coast or in Mount Lebanon, in spite of the fact that some of these areas are overwhelmingly rural

those from Lala¹⁶, are kept busy working their own orchards or summer crops. Therefore, seasonal migration is not a real problem in either village. Having developed the theoretical framework in chapter two, the national and local background in chapter three, and the research methods here in this chapter, the natural progression requires an elaboration of the research hypotheses.

4.15 HYPOTHESES

This section very briefly reviews the contract theory of remittances and proposes some hypotheses. They are based on that theory and are framed inside the context of the case study, that is the two villages that are being analyzed.

4.15.1 The Contract Theory of Migration and Remittances

In formulating their theoretical constructs on the question of "why do migrants remit", Stark and Lucas (1988) used the insurance contract approach. This concept is appropriate for understanding migrants' commitment to their families because insurance is, by definition, an

"institution that mitigates the influence of uncertainty. The individual invests in a host of activities *now* to insure that the timing and magnitude of unfortunate future events will be less harmful. These activities enable firms and individuals to trade risks among themselves" (McCall 1987, 869).

In Stark and Lucas's (1988) theory, the family is initially the insurer after which roles are switched and the now established migrant fills that role. The fundamental assumptions are: (1) The sending family's "desire to adopt a new

¹⁶ Orchards are increasing in Lala due to the flow of remittances and the out flow of the local labour force

production technology in agriculture"; (2) both the head of the family and the potential migrant are averse to risk; (3) neither one of them is able to sufficiently self insure (ie. can not absorb the added risks of new farming methods or of migration); (4) and neither of them can make "insurance-type arrangements with a third party" because it would be more costly both financially and socially. It is worth noting that Lebanese families as a whole had the added risks of war, and those in Khirbit Kanafar experienced a geo-sectarian threat-by-extension¹⁷.

The theory states that migration of a family member is implicitly insured by the head of this family, the insurer. The new migrant, the insuree, will incur costs of transportation and urban living, and risks of rapidly finding and maintaining urban employment. Such potential and temporary costs, which take the form of remittances, are borne by the family until the migrant is established. Therefore, in the first stage of the migration process, family capital is initially invested in an insurance contract with the migrant who is entitled to make claims during adverse events such as unemployment spells. Later the family expects remittances as a return on its investment, or as a delayed payment for the provision of insurance coverage. As the new migrant becomes established and begins to remit, the head of the family in the sending region, now reaping the benefits of his investment, will then be able to adopt new high-yield agricultural techniques in spite of the normally deterring high-risk content. This shows how this implicit arrangement benefits both the migrant and his

¹⁷ During the first few years of the civil war, many families from Christian communities in the province of Bika'a emigrated, some by "choice" and many others by force. This must have instilled fear in the hearts of residents and emigrants. It is worth repeating that both Lala and Khirbit Kanafar were under the Israeli occupation for three years (1982-1985)

family

Migration can then be viewed as a diversification of investment in the presence of financial and security risks. However, the question remains: why does the now-established migrant abide by an unwritten implicit and seemingly non-binding contract from his/her adopted home, an act that will benefit his family but have a net negative effect on his personal income?

4.15.2 Why Remit?

The implicit voluntary insurance contract struck between the family and their sibling is seen as beneficial to both parties who will default on this contract if their discounted, net expected returns are negative. In the early stages of the migration process, migrants' feel a sense of obligation to re-pay their families for their investment in them. Besides, the migrant still has a feeling of family loyalty and has not yet been influenced by "alien", individually-oriented (default-inducing) social norms. Moreover, the migrant and his family are assumed to be altruistic which means that one party's altruism towards the other would be perceived as a benefit to the giver.

Therefore, in the initial period after migration, the theory states that the migrant faces "urban hazards" in terms of finding and maintaining employment. Moreover, in this phase, migrants are busy settling down and getting established, an activity that requires resources. Thus the level of remittances is initially low or non-existent. It then increases up to a certain point in time only to decrease afterwards when "altruism wanes" (Stark and Lucas, 1988).

4.15.3 More Default-Deterring Factors

As for the migrant in whom his family has invested, there are other default-deterring factors which Stark and Lucas (1988) have identified. Migrants are said to remit not because they are good children who want to help their families but because they aspire to inherit their parents' wealth. Another factor deals with migrants who intend to return to their home village, even for a visit. They would need to maintain good relations with their residual family members who are instrumental at guaranteeing a siblings' reputation (Stark and Lucas 1988; Lucas and Stark 1985; Pollak 1985; Becker 1987 and 1981). This amounts to the provision of a social base which greatly facilitates the reintegration of returning migrants into their home community. Finally, the remaining family members can greatly facilitate a migrant's rural investment and its maintenance. These factors induce migrants to remit and abide by the families' (insurance) contract. However, investment in or return to Lebanon would seem unlikely during the protracted 15 years of civil war, thus (perhaps) a lower propensity to remit.

Conceptually, migrants remit to repay their parents for their investment in them, such as in their education, and because migrants are interested in inheriting their parents property. After all, the price of real estate soared in most of Lebanon during the civil war. Therefore, the more land owned by a family the higher is the level of remittances likely to be.

4.15.4 Level of Remittances

Human capital theory presupposes a rational and economically calculating person who emigrates only if anticipated economic and psychic benefits are larger than the economic costs. International migrants accumulate more human capital than internal migrants because the former's financial, psychic, and insurance costs exceed the latter's. Wage and welfare differentials between internal destinations within less developed countries and international ones in more developed countries are usually quite large. Therefore, (i) high income countries should be the destination choice of most potential migrants from low income countries. Moreover, (ii) those who migrate internally are expected to remit less (in fixed dollar terms) than those who go abroad.

Using Stark and Lucas's (1988) conceptualization of migration and remittances, both internal and international migrants require family insurance against "urban hazards" such as unemployment. This insurance binds the migrant into an implicit contract with his family hence his obligation to repay them. It is relatively inexpensive to insure the emigration of a single, educated, and young family member because this minimizes the probabilities of adverse selection. A migrant with these characteristics would be most likely to succeed (i.e., educated thus less likely to file insurance claims) and remit (i.e., single thus bigger returns on family's insurance-investment).

4.15.5 Land and Emigrants

A household invests in (or "insures") a migrant so to improve the lot of the whole family, ie., people do not migrate for self interest or self investment. Therefore, (i) those who emigrate to Beirut or to the West are both expected to remit, albeit at different levels; (ii) The more land owned by a family the lower the number of emigrants.

4.15.6 Domestic Income

Theoretically, migrants remit, at least in part, to improve their family's agricultural production potential. Thus the more remittances families receive: (i) the greater their income increments from agriculture and other non-agricultural activities (excluding remittances); (ii) the more likely they are to switch to more lucrative crops; (iii) and the less likely they are to have idle land. It should be noted that during the civil war, urban employment opportunities were radically reduced and government agricultural programs were suspended.

4.15.7 Lala Versus Khirbit Kanafar

Internal migrants are attracted by the amenities of urban life such as educational and medical facilities, greater employment opportunities, bright lights, as well as the same cultural surroundings where the same language and religion are practised. This can be contrasted with international migration where cultural amenities are not available for, say Muslims in the West (Khuri, 1967). Therefore, Muslim migrants from Lala would be expected to find it easier to migrate internally (or to neighbouring Muslim countries) where they could stay in the same cultural

and religious milieu.

Christians from Khirbit Kanafar and from Lebanon in general have historically had an orientation towards western culture. Thus French, for example, is spoken in several homes. Moreover, Christian migrants have an easier time assimilating in the West by virtue of their similar religious beliefs and values (Khuri, 1967). Therefore, more migrants from Khirbit Kanafar are expected to emigrate internationally.

In short, for the traditionally poorer Muslim villagers of Lala one would expect more internal migrants because of the lower psychic and financial costs involved; the opposite should be the case for the better off Christian villagers of Khirbit Kanafar.

4.15.8 Return Migrants

In return for a migrant's remittances, the receiving family sets and maintains the social ground (reputation) for the migrant to return to the home village, even for a visit. Because of this interdependency, the community with the greater proportion of remitters should experience a greater proportion of returnees or visiting migrants.

4.15.9 Education and Emigration

In Khirbit Kanafar, social prestige is earned through education and the attainment of urban employment and wages in Beirut or elsewhere in Lebanon. Unlike Lala, Khirbit Kanafar enjoyed good roads, and a daily bus service to the capital city decades earlier than Lala. On the other hand, Muslim villagers in Lala perceived themselves as disadvantaged relative to neighbouring Khirbit Kanafar.

They had bleaker chances of finding urban jobs even if they were educated. Hence they de-emphasised education and encouraged emigration, where opportunities for economic and social advancement (upon returning) abound. Therefore, one would expect a higher level of education in Khirbit Kanafar than in Lala. Because most urban opportunities in Less Developed Countries are usually in the informal sector, rural to urban migrants have a lower level of education than international ones.

4.15.9.1 Fertility and Remittances

Remittances reduce the cost of raising children thus there should be greater fertility in remittance-receiving than in non-remittance receiving communities. It should be noted that if high fertility is observed in the traditional community with declining agricultural activities (Lala), it might be due to the lower relative cost of emigration compared with the returns of emigration (remittances), in addition to the social network abroad which facilitates the sponsorship of kin.

4.16 CONCLUSION

In this chapter, the research approach and tool, as well as field problems were discussed. Based on the theoretical framework outlined in Chapter two, some hypotheses were put forward which will be tested and discussed in the following analytical chapter.

C h a p t e r F i v e

THE IMPACT OF MIGRATION AND REMITTANCES: AN ANALYSIS

5.1 INTRODUCTION

The two neighbouring villages under study, one of which is Muslim and the other Christian, are located in the Bika'a valley inside the Western Bika'a administrative unit. While the majority of the population in the valley is Muslim, there is a Christian minority which is mostly concentrated in five villages of various sizes which are located on the eastern slopes of Mount Lebanon (ie. the western side of the Bika'a valley). Although the two villages are similar in size, economic base and in many other aspects, they differ in terms of the destination choices of migrants, remittances, and level of development.

This chapter outlines the effects of migration and remittances on the two villages under study. First, the general socio-economic characteristics are discussed. Second, the level of emigration and the destination of migrants from both villages are examined. Third, in a substantial section, the impact of emigration on the economy of Lala is addressed. (The absence of remittances to Khirbit Kanafar is also

discussed.) Because remittances are a major source of rural change and development in the post migration period, the factors that affect their flow to Lala are probed using multiple regression analysis. The same technique is used to develop domestic income models for each of the villages under study. Results from these analyses are used to test tout migration and remittances. Additional survey data are used to bolster certain arguments about the effects of emigration on the rural economy. Finally, the theoretical framework of Stark and Lucas (1988) is expanded to reflect the effect of emigration on a family's income.

5.2 MIGRATION TRENDS

In spite of the proximity of Lala and Khirbit Kanafar's, and their economic similarities, they reveal contradictory trends in migrant destinations. Both villages have experienced a high level of emigration: 42.4% of the children of surveyed families emigrated from Lala, compared to 39% from Khirbit Kanafar. These figures would be much higher if calculated for age-specific potential emigrants, that is, for children over the minimum emigration age of 15.5.¹ It is interesting to note that if these village rates were broken down into son and daughter rates, they reveal a greater (by 6%) level of daughter emigration from Khirbit Kanafar than Lala, and a greater (by 11%) level of son emigration from Lala than Khirbit Kanafar (Table 5.1).

¹ The mean emigration age is 17.5.

Table 5.1

Number of Siblings in Surveyed Households and
the Level of Emigration From Each Village

	Lala*		Khirbit Kanafar**	
	Numbers	%	Numbers	%
Number of sons	461	55.5	187	49
Number of daughters	369	44.4	196	51
Total number of children	810	100	383	100
Migrant sons	226	49	71	38
Migrant daughters	126	34	79	40.3
Migrant sons & daughters	352	42.4	150	39
Non mig. sons & daughters	479	57.6	233	61

* N=124

** N=90

Throughout this chapter, and thesis, a distinction is made between a family of orientation (brothers, sisters and parents) and the family of procreation (wife and children). This is the rationale behind the use of atypical terms such as sons, daughters, brothers and sisters of respondents.

Many factors are related to this variation in the level of emigration. The backbone of the agricultural sector in Khirbit Kanafar is irrigated export cash crops, while that of Lala is subsistence-type rain-fed fields, hence farming is far more lucrative in the former than in the latter village. Moreover, Khirbit Kanafar has more public and private facilities and institutions than does Lala. For example, Khirbit Kanafar has a high school, technical school, hospital, and a hotel, none of which Lala has. Therefore, Khirbit Kanafar's lucrative farming and its various institutions, which

provide some local employment opportunities, may explain the village's somewhat lower level of emigration when compared to that from Lala.

The higher rate of female emigration is probably due to two factors. Firstly, Khirbit Kanafar's residents have had a long standing relationship with "the city", Beirut, where a many of Khirbit Kanafar families own or lease homes. Therefore, it becomes more socially acceptable for a single woman to migrate to the city where she could stay with, say, her brother or her brother in law². Secondly, Lebanon's Christians are more accepting of women in the work force (outside the family domain) than their Muslim counterparts (Khuri 1967).

5.3 DESTINATION CHOICES: COMPARISON WITH AN EARLIER STUDY

The choice of Lala and Khirbit Kanafar for this study was partly influenced by the fact that they differ in their religious composition. This difference was suspected to have an influence on migration and remittance patterns in each of the villages.

There is no recent research that compares migration patterns from Lebanese communities with different religious or ethnic compositions. The only similar study was done over twenty years ago by Khuri (1967), a sociologist at the American University of Beirut. Although Khuri's study deals with religious *sects different than those covered here*, his research had considerable influence on this research, especially in the formative stages. The following section offers a brief description of Khuri's

² It is generally not acceptable for one or even two single women to live alone away from home.

study and compares his findings with this research.

Khuri (1967) found that Christian and Muslim villagers in Lebanon exhibited different migration trends. In his study, Shia Muslim migrants (from the village of Armti) overwhelmingly chose internal urban destinations, while Christian Greek Orthodox migrants (from the village of Douma) chose Western countries. The reason, according to Khuri's (1967, 209) interpretation, is that the Lebanese city³ atmosphere enables Shia Muslims,

"to practice their law and customs more effectively than in the country side. The [Lebanese] city's economic services, being adaptable to routine, are accommodated to Islamic prayer and festivities more easily than agricultural work that varies with weather, season and labor. It is not only the city as centre of economic services that facilitates the application of Islamic practices, but also the city as a religious centre. The city supports the mosque, the *imam* (religious leader), the jurist, and other authorities required for the interpretation and enforcement of religious rules. As both a religion and a state, Islam requires experts who are available only in the cities to interpret its complex jurisdiction."

In his article, Khuri (1967) argues at some length that Lebanese Muslims can best practice their religion in (Lebanese) cities, and that the prophet of Islam, Muhammad, encouraged his followers to migrate to the city. He adds that cultural pressures of the West are incompatible with Shia Muslims, thus inhibiting their international emigration.

Lebanese Christians, according to Khuri (1967, 210), are indifferent as to where they live in Lebanon, although village life is seen as somewhat more desirable than "the profit-motivated trades of the city." On a global scale, however, Christian

³ In Khuri (1967), "city" is assumed or understood in the Lebanese setting. Because he is not explicit about its exact meaning, one can extend it to include Muslim and Arab cities.

emigrants tend to admire Western cultural patterns and deplore life in the village they had left. Unlike their Maronite Christian brethren, Lebanon's Greek Orthodox are denied opportunities and feel marginalized because of the formal and informal organization of Lebanese society along confessional (religiously-based) lines (Khuri 1967, 210).

In the case study considered here, the destination choices of migrants from Lala and Khirbit Kanafar contradict those in Khuri's study: While 64.8% of male migrants from Khirbit Kanafar chose East Beirut and the Christian enclave north of the capital city, over 95% of those from Lala chose overseas Western destinations and rarely Arab or internal⁴ ones (See Figure 5.1). This trend affects the level of remittances to and development in the villages, an aspect that will be dealt with later in this chapter. The contrast in destination choices prompts one to ponder if Lala's trend is a new development and what are its possible causes.

⁴ While the migration process is known to be male selective, there is an almost equal representation of both sexes in the migration streams from Khirbit Kanafar, and a much more pronounced male representation from Lala. Male emigrants exceed female emigrants by 2% in the former village, and by 15% in the latter one. It should be noted that a number of females from Khirbit Kanafar emigrate (mostly internally) while unmarried, a pattern that is almost totally contrasted in Lala.

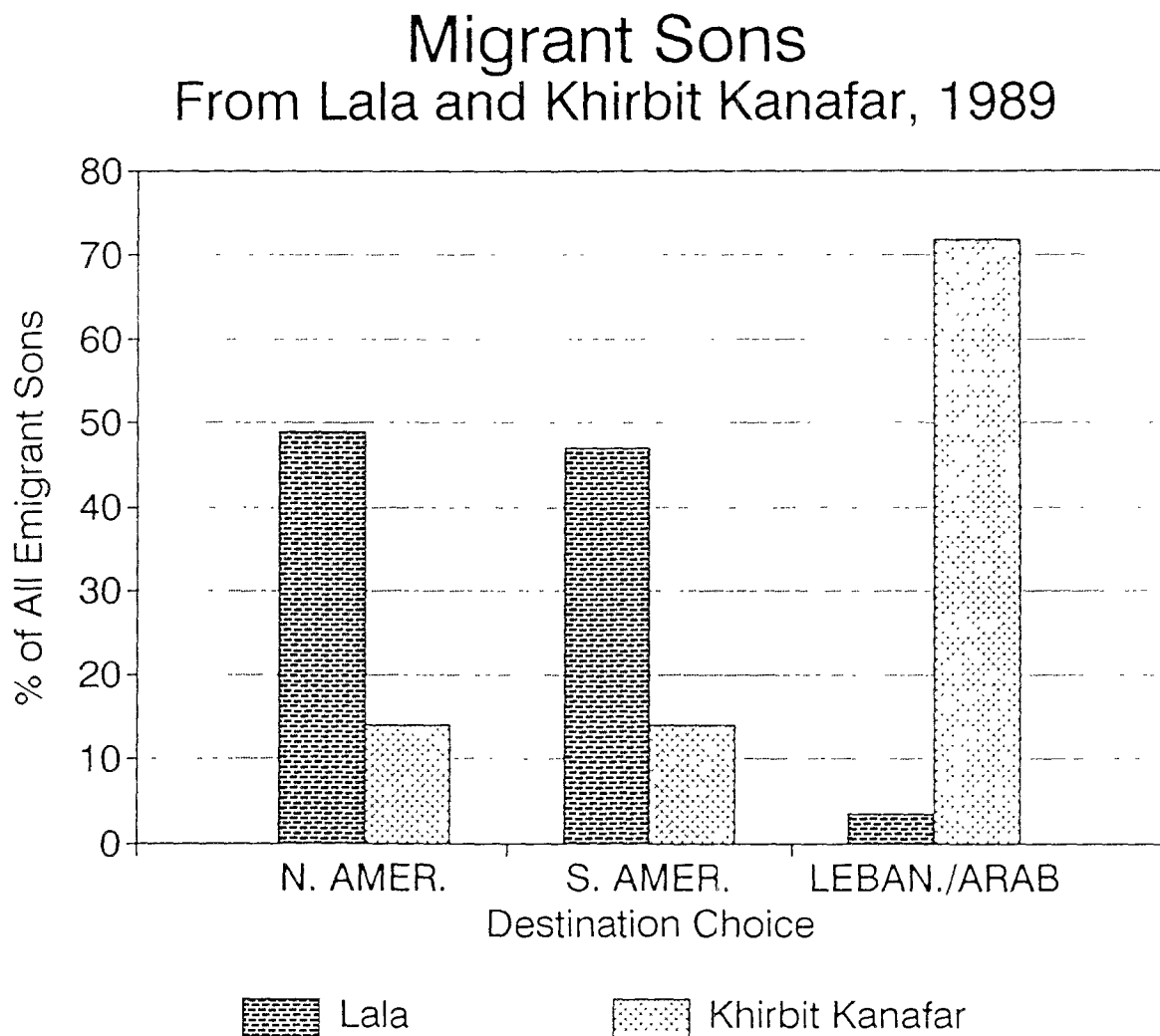


Figure 5.1

Migrant sons from Lala and Khirbit Kanafar

5.4 EARLIER DESTINATION CHOICES: THE FAMILY OF ORIENTATION

Earlier emigrants are those who had emigrated 12 to 40 years before the survey was conducted. Therefore, it covers the period that preceded the current one in which respondents' family of orientation (ie. brothers and sisters) emigrated. Data about this earlier generation were gathered to help in shedding light on previous emigration and fertility trends in Lala and Khirbit Kanafar.

Considering the family of orientation, the levels of emigration and the destination choice of the earlier generation of migrants appear to have changed somewhat over the years. Members of respondents' families of orientation in Lala experienced an emigration level of 43.7%, while those in Khirbit Kanafar 47%, with the former experiencing a far higher level of international migration⁵. A small number of Lala residents had emigrated to Lebanese cities (mostly to metropolitan Beirut) only to return after the civil war started in 1975. One can conclude that *earlier* emigrants from Lala had more or less always been attracted to international destinations. However, emigrants from Khirbit Kanafar were almost evenly split between international and internal destinations, with the latter becoming more attractive during the war.

Knowing that Lebanon's confessional system has remained the same and assuming that the level of religious conviction of the country's Greek Orthodox and Muslims is about the same or changing in tandem, one wonders what is behind this

⁵ International migration excludes those to Syria but includes those to oil-rich Arab countries, albeit such destinations rarely attract migrants from either village.

stark difference in results between those of Khuri (1967) over 20 years ago and those reported here. For example, knowing that the Muslim village in Khuri's study is Shia, and Lebanon's coastal and migrant-attracting cities are predominantly Sunni, one would then expect the Sunni migrants of Lala to be more attracted to Lebanon's cities than to Western destinations. Why is that not the case?

5.5 DESTINATION CHOICES: AN INTERPRETATION

One reason that may explain the internal migration of Khirbit Kanafar residents pertains to the dominance⁶ of Maronite Christians in Khirbit Kanafar, a religious group that is, unlike the Greek Orthodox in Khuri's (1967) study, advantaged in terms of urban civil service jobs. Another reason is related to Khirbit Kanafar's residents who quickly became poor when the purchasing power of the Lebanese Lira rapidly deteriorated. A civil servant's monthly salary declined from around \$1000 in the late 1970s to about \$100 one decade later. Therefore, a person's entire annual salary in 1989 would be needed to purchase an airline ticket to Canada or the USA thus making internal migration far more affordable and attractive.

Households in Lala that have remitting males abroad (and the majority do) were affected positively by the devaluation of the currency because the purchasing power of the American dollar⁷ increased dramatically. In fact the building boom in Lala is correlated with the rapid devaluation of the Lebanese pound which started in 1983.

⁶ Greek Orthodox and a very small number of Druze also live in Khirbit Kanafar.

⁷ Almost the only currency of remittances.

Because the residents of Khirbit Kanafar have advantages in terms of urban employment and natural endowments (water-for-irrigation) in the village, it appears that its residual, non-migrant, residents received little or no remittances prior to the civil war, perhaps because they were economically comfortable. The absence of international remittances after the collapse of the Lebanese currency is likely due to the breakdown of Lebanon's postal service, and for a number of other social and geo-political reasons which are discussed later in this chapter.

Moreover, the location of Lebanon's only international airport in Muslim West Beirut may have made some of Khirbit Kanafar's Christian residents hesitant about emigrating internationally. While international emigration was possible through Junieh's seaport in the Christian canton (and then via the international airport in Cyprus), it was a costly, somewhat uncertain, and often a risky journey. These factors and other considerations help to explain Khirbit Kanafar's emigrants shift away from international destinations.

As for the strong internal Shia emigration from Armti and the international emigration of the Sunni from Lala, this is probably related to geo-political and economic factors. Armti is located deep in southern Lebanon not far from the Israeli border, a region that has for decades been neglected by the central government, thus making it one of the poorest in the country.

Moreover, by comparing the list of jobs occupied by villagers in Khuri's (1967, see Table 5, p.210) case study, it becomes obvious that Christian villagers from Douma had more professional jobs and a higher level of education than did those

from the Muslim village of Armti. Given these factors, one can say that the lack of development in the Muslim village, its lower level of education and living standards (and income) account for its people's attraction to, for example, Beirut and not to Britain because the latter is unaffordable. While this finding contradicts the one reached in this thesis (an issue that is untangled in a later section), it is important to briefly explain how Lebanon's confessional system of government affected the level of economic development of various religious communities.

The Christian-Muslim dichotomy in development is widespread. After reviewing a number of studies and data sets (primarily from the 1970s) concerning the socio-economic development of Lebanon's Muslim and Christian populations, Farsoun (1988, 123-124) arrives at the following two conclusions:

"The first is that considerable demographic, social and economic differentiation exists between the populations of the two religions and among the Islamic sects, but not among the Christians. The intra-Muslim variation is large, with the Shi'a placing in the lowest socio-economic status of the six major sects of Lebanon. The second clear cut conclusion is that Muslims in general are substantially more disadvantaged in socio-economic terms than Christians."

In a more recent article about economic conditions in the central Bika'a valley, Harris (1985) compares the city of Zahle, the capital of the Bika'a province with the second largest city in the province, Baalbek. The former has a population of about 130,000 almost all of whom are Christians⁵. The population of the latter is about 100,000, most of whom are Shia Muslims. Harris (1985, 285) gives a

⁵ Fifty percent of the city's population are Greek Catholics, 25% are Maronites, and 15% Greek Orthodox (Harris, 1985, 271).

Table 5.2
Comparing Services and Facilities
in Zahle and Baalbek, 1984

Facility	Zahle	Per Capita [Value x 10,000]	Baalbek	Per Capita [Value x 10,000]
Doctors	95	7.3	40	4.0
Hospitals	2	.15	4	.4
Pharmacies	16	1.23	8	.8
Lawyers	43	3.3	12	1.2
Engineers	35	2.7	6	.6
Public Schools	16	1.23	5	.5
Private Schools	18	1.4	28	2.8
Bookshops	12	.9	4	.4
Money Exchanges	10	.77	5	.5
Hotels	8	.62	5	.5
Restaurants	30	2.3	9	.9
Cinemas	5	.39	3	.3
Petrol Stations	13	1.0	9	.9
Banks	9	.69	3	.3

Source: Harris (1985, 285).

breakdown of the services and facilities available in each city (Table 5.2).

Table 5.2 elucidates that Zahle is an unrivalled centre of commercial activities in the Bika'a valley. This is understandable: the city is an administrative centre because of its role as the province's capital, and it is strategically located in the centre of the province along a major road to Beirut. However, the table also reflects a lower level of education and professional training in Baalbek, as well as an imbalance in development favouring Zahle. It, for example, has three times more public schools than Baalbek. While there are twice as many private schools in Baalbek than in Zahle, public schools are usually larger in size than private ones, and are affordable by most families. Moreover, since the residents of Baalbek are Muslims who traditionally have a higher birth rate than Christians⁹, they are likely to have a greater number of school-age children than those in Zahle.

The confessional distribution of political power which favours Lebanon's Maronite Christian community and the domestic dynamics of the country's politics have resulted in the almost complete neglect of development in certain (usually Shia Muslim) villages and regions. Additionally, many lucrative urban government opportunities are distributed along confessional lines thus putting them beyond the reach of many of Lebanon's 17 officially registered sects. These factors precipitated a sense of resentment toward Lebanon's ruling families and resulted in a mass urban-bound exodus of people from underdeveloped and/or unstable (mostly southern) villages to affordable or accessible internal or international destinations.

⁹ as is the case for Lebanon generally.

This study shows that the earlier gap in the level of education between residents of Khirbit Kanafar and those of Lala is closing. However, there is no evidence to suggest that Lala residents are seeking civil service jobs, perhaps because of an engrained earlier pattern of sectarian bias in employment.

However, Lala and Khirbit Kanafar do not rigidly follow the national developmental dichotomy. In other words, while Lala had less access to public facilities and employment opportunities than Khirbit Kanafar, it is not impoverished as it has had, since the late 1960s, many basic services such as running water and electricity. Moreover, a few of Lala residents had urban/government positions or traded with the coastal cities. During the decade and half of the country's mostly urban civil war, Lala residents' contacts with internal urban centres had almost ceased while those of Khirbit Kanafar were largely unchanged.

Although there are more professionals in Khirbit Kanafar than in Lala, the latter village is currently better off economically than the former. This is due to Lala's dependence on generous remittances which work to boost the income of the majority of the village's residents. Lala residents have more relatives abroad than those in Khirbit Kanafar, a factor that has always made it relatively easy for Lala residents to emigrate, especially during the civil war years.

On the other hand, Khirbit Kanafar's migrant professionals, the majority of whom work in urban Lebanon, earn incomes that are almost at par with those earned in the village. This new, close-to-zero, income differential between urban and rural areas is a recent phenomenon. Until the late 1970s, there was a sharp

difference in wage levels between the two areas. This means that professionals are no longer part of the elite who can afford the costs of international migration. This may explain the international emigration in the 1960s of Christians in Khuri's study, and Muslims in the current study. In essence, the former group was better off economically (compared to the Shia community) because of high professional incomes, and the latter is currently better off (compared to the Christian village of Khirbit Kanafar) primarily because of remittances. There is an underlying agreement between Khuri's study and this one: people from the more affluent community can afford the costs and risks of international emigration, a move that substantially increases peoples' human capital and hence yields greater returns on investment.

This finding is supported further by the fact that Lala's total annual household income is almost twice that of Khirbit Kanafar, and its level of landlessness is one half that of Khirbit Kanafar (Table 5.3).

The religious affiliations of each sect was used by Khuri as an explanatory factor of migrant destination preferences, while he overlooked the "confessional economy", that is the economic dimension of the National Pact (Kubursi 1991). This power sharing arrangement has led to serious regional (hence sectarian) disparities in terms of income and employment opportunities (Amery and Kubursi 1991). It appears, therefore, that economic rather than doctrinal differences between Lebanese sects are most useful in explaining emigration and destination trends from rural Lebanon.

Table 5.3

Average Area of Land Owned by Household in 1989

Land Area in Dunums*	Lala		Khirbit Kanafar	
	Number of Households	%	Number of Households	%
0.00	13	10.48	19	21.11
0.5-3.99	8	6.45	12	13.33
4-49.99	81	65.32	49	54.44
50-99.99	14	11.29	8	8.89
100+	8	6.45	2	2.22
Total	124	100	90	100

* 1 dunum = 920 m²

One of Khuri's findings is confirmed in this research. It has to do with the number of destinations chosen by Muslim and Christian migrants; the former tend to concentrate in one general area and the latter to disperse. The overwhelming majority of Lala migrants are in Alberta and in Parana, a province in southern Brazil. On the other hand, Khirbit Kanafar's international migrants are scattered across the USA (mostly in Ohio, New York and New Jersey), Canada (mostly in Ottawa), Africa, Australia, and in a number of countries in central and southern America.

Having examined the differences between Khuri's study and this one, the following discussion deals with other relevant findings such as family size and land use in each of the villages. These issues are not covered in Khuri's study and are found to be important in this one.

5.6 FAMILY SIZE

According to Becker and Tomes (1986, S32), "Additional children in a family reduce the amount invested in each one where investments must be financed by the family. Consequently, a negative relation between family size and earnings of parents also reduces the intergenerational mobility of earnings." This assertion becomes more significant when one considers the growing trend toward labour-saving technologies in the Third World.

By looking at the Table 5.4, a difference in the before-emigration household size in Lala and Khirbit Kanafar is evident, with the former having just over two children more than the latter. In spite of the declining agricultural sector and its

increasing mechanization, Lala residents *continued* to have more children than those of Khirbit Kanafar.

Table 5.4
Average Household Size Before and After Emigration

Period	Lala	Khirbit Kanafar
Pre-emigration Size (1989) [*]	8.70	6.24
After Emigration (1974) ^{**}	6.82	5.11
After Emigration (1989) ^{***}	5.43	4.36

^{*} Migrant and non-migrant children as reported in 1989.

^{**} Resident children in 1974.

^{***} Resident children in 1989.

In Lala this may be attributed to the lower cost of raising children who become effectively subsidized by remittances. Moreover, the presence of a close family member or a son in a Western country gives the family head a sense of security about his children's future because one can always emigrate to join his brother or uncle in the "land of opportunity". In addition to this, some may view an extra child as a "good investment" because he would eventually emigrate and further boost family income. Available data make it fairly clear (in a later section) that the more sons abroad a Lala family has, the higher the level of remittances, a finding similar to that of Philpot (1968).

In Khirbit Kanafar, agriculture is far more mechanized than in Lala and requires far less labour. Moreover, Khirbit Kanafar residents have for decades had a close relationship with the country's cities, and with Jesuit and philanthropic missionary educational institutes. These appear to have seriously influenced life style

and attitudes toward children and fertility. It is worth noting that, nationwide, rates of fertility have been shown to be higher among Muslims than among Christians in spite of the fact that Islam allows contraception and Maronite-Catholicism does not (Gordon 1983; Drysdale and Blake 1985).

5.7 LAND USE IN LALA AND KHIRBIT KANAFAR

Khirbit Kanafar and Lala are agricultural villages with two traditional farming approaches. While the former is well endowed with water springs and artesian wells thus qualifying as an irrigated (*marwiyaa*) village, the latter relies upon rain-fed agriculture thus classified as a non-irrigated (*la marwiyaa*) village.

Since Khirbit Kanafar is well endowed with water resources, a relatively large proportion of its farm land (35.8% in 1989 up from 25.9% in 1970s¹⁰; See Table 5.5) is devoted to irrigated produce yielding lucrative export cash crops. On the other hand, in spite of a slight shift over the last 15 years from cereal crops to tree crops (eg. olive and cherry orchards), Lala's farmers use over one quarter of their land (26.7%) for non-lucrative¹¹ cereal production and one fifth (22.2%) for tree crops.

Modern agricultural technologies are known to improve crop yields, and to minimize the effort and labour force needed in this sector. While farm mechanization is wide spread in both villages, Lala farmers, unlike those in Khirbit

¹⁰ "1970s" was used as a reference period for respondents because asking them about specific land use or income figures from specific years fifteen or so years earlier was considered an unreasonable request because it could result in inaccurate data. This issue was discussed at more length in the methodology chapter.

¹¹ Wheat, which constitutes the main crop in the cereals' category in the Biq'a valley, is price controlled by the central government. This makes it quite an unprofitable crop to grow on a commercial basis, thus farmers grow it mostly for "subsistence" needs.

Kanafar, are recent converts to the use of modern farming techniques. For example, Khirbit Kanafar, unlike Lala, does not have a single animal-driven plough. This means that farmers plant their orchard trees in parallel lines with enough space between them for a small ploughing tractor to pass.

Khirbit Kanafar farmers derive a greater proportion of their domestic income from agriculture than do those in Lala. This is due to the use of irrigation, intensive use of agricultural technology, and adaptability to market demand¹². Moreover, the absence of an outside source of income makes village residents more heavily dependent on their land than those in Lala.

Table 5.5 Changes in Land Use in Lala and Khirbit Kanafar (1970s-1989)

Village	Period	Cereal	Tree	Idle	Total
Lala [*]	1970s	2273	706	452	3431
Khirbit Kanafar ^{**}		907	409	261	1577
Lala	1989	895	745	1715	3355
Khirbit Kanafar		521	438	264	1223

^{*} N=124;

^{**} N=90;

Area in dunum.

In summary, arguments in the preceding sections have shown that emigrants from Lala choose international Western destinations while those from Khirbit Kanafar choose internal ones. It is asserted that economic and socio-political factors

¹² For the last few years some Khirbit Kanafar farmers have been gradually planting persimmons on portions of their land, a very lucrative fruit that is now in great demand locally and in neighbouring Arab countries.

affect the destination choice of migrants and not their religious orientation. On a different level, the pre-emigration family size in Lala is larger than that in Khirbit Kanafar.

The preceding pages provided a general discussion of various issues in Lala and Khirbit Kanafar. These issues ranged from the destination choice of emigrants from each of the villages to emigration trends and land use. Many questions remain unanswered: what are the effects of emigration on the two villages? Do remittances fluctuate over time? Do young emigrants remit to inherit? Why do residual Khirbit Kanafar households not receive any remittances? And what variables affect domestic income in each of the villages? All these questions will be addressed in the following sections. Toward the end of this chapter, and in light of the findings, the theoretical framework is elaborated.

5.8 ANALYSES OF REMITTANCES

Remittances are a key factor affecting rural change in the post migration period. Their fluctuation over time or their eventual halt could have a profound impact on the socio-economic development of a village like Lala. Its residents have grown dependent on this income from abroad which constitutes almost 50% of their total annual income.

Hypotheses with direct relevance to the contract theory of migration and remittances were stated in an earlier chapter. The following is a brief recapitulation of the hypotheses discussed in this section. One hypothesis states that the level of remittances in the initial period of migration is normally low to non-existent, after

which it increases, only to decrease over time. Another hypothesis states that migrants remit because they desire to inherit their parents' land and other property.

As a precursor to the formulation of explicit tests for these hypotheses, statistical tests of association, including Pearson's correlation coefficient, t and chi square (χ^2) tests were applied to the data. These analyses provide statistical confirmation of many of the existing intuitions about the data. For example, the correlation coefficient between the level of remittances (RMT89) received by a family and the number of migrant sons (MS) it has is 0.35 (Sig. =.000), while remittances appear to have no relationship ($r=.09$; Sig.=.157) with the number of migrant daughters (MD). In fact, using chi square, the hypothesis that the flow of remittances is not affected by the number of migrant daughters could not be rejected¹³. These two related findings confirm a cultural reality where a migrant daughter remits not to her family of orientation but to her husband's.

While these simple analyses provide some useful insights into the data, they are of limited value for the purpose of testing research hypotheses because they do not allow for the control of more than one of the independent variables simultaneously. For this reason multiple regression analysis is a more useful tool because one can, say, test the relationship between the variable remittance as an dependent variable, and a number of independent variables (such as the three categories of sons' years away) controlling for one and observing the behaviour of others.

¹³ $\chi^2=1.45$, d.f.=2, and $\alpha < 0.5$

5.9 UNDERSTANDING REMITTANCES

Because of the inadequacy of bivariate techniques to explain certain questions fully, a *multivariate regression analysis* is used. As implied in the term *multivariate*, this type of regression approach has the capacity to describe the relationships between two or more independent (X) variables and one dependent (Y) variable. This method is, therefore, used to test the hypotheses outlined earlier.

In this section, the variables used in the analyses are alphabetically listed and defined. Then there is a discussion of a multiple regression analysis¹⁴ model of remittances which is designed to address a number of remittance-related questions.

While remittances are a major source of income in Lala, it is not the only one. To fully understand the rural economy, it is necessary to determine the various sources of domestic income and the factors that affect a family's potential to earn a living from Lebanon. Therefore, a regression model of domestic income is developed to determine the source(s) of income in Lala, and to assess the influence remittances have on domestic income.

A unique aspect of this research is the absence of remittances to Khirbit Kanafar (thus restricting the remittance model to Lala). In view of this, the factors that constitute a family's potential for earning an income domestically become an especially important question for Khirbit Kanafar. A domestic income model for this village is developed, a model that helps to understand Khirbit Kanafar's economy

¹⁴ In developing these regression models, SPSS PC⁺ was used. The linear regression line was fitted using the "forced entry" regression method followed by another run using the stepwise approach.

and how it may have affected remittance levels and migrant destination choices.

5.9.1 The Variables

The following is an alphabetized list of the codes for the variables used in this section. While this can be used as a standard quick reference, it will not always be necessary because some variables are defined or discussed again in certain sections of this chapter.

- BLDSON:** the remittances received and used to build a home for the respondent's son.
- CEREAL:** the area of arable land used in 1989 for cereal crops such as barley, lentils, chick peas and wheat, the latter being the most dominant.
- HHHAGE:** the age of the head of each household.
- HHHED:** the years of schooling that the head of a household has.
- HHSIZE:** the size of each household after migration (ie. summer of 1989).
- IDLND:** the area of arable land that was unused in 1989.
- LBNY:** each household's "made in Lebanon" domestic income.
- MSYRED:** the average number of years of education that each migrant male had before his emigration.
- NTRIPS:** the average number of trips that an emigrant male(s) takes to Lala.
- NONMSD:** non-migrant sons and daughters (residual family members).
- RMT:** The remittances received by a household for its own (domestic) consumption in one year (1988-1989), excluding non-financial gifts. In other words, remittances invested in buildings, retail stores, agriculture or in other sectors were not included.
- RMTSTRBLD:** remittances that were invested in buildings (including home construction) and in setting up a retail store. The question related to this variable asked whether ("yes or no") remittances had been used to build a home, a retail store, purchase land, or buy an apartment building.
- SCN:** the number of migrant sons that each household has in Canada.
- SBRZ:** the number of migrant sons that each household has in Brazil.
- SOTH:** the number of migrant sons that each household has in other, mostly South American countries.
- SLBN:** the number of migrant sons that each household has in Lebanon (internal migrants).
- SYRABRD:** the average number of years that a migrant son(s) has been abroad.
- SAWY05, SAWY614 and SAWY15+:** are three variables that stand for the number of sons who have been away for up to five years, 6 to 14 years, and over fourteen years, respectively.
- TBLDSON:** the family agreement that the emigrant will remit to have a home built

for himself.

TREE: the area of arable land planted in trees (orchards) in 1989.

TLRTMIG: the total number of returnees.

After each model is developed, a matrix of partial correlation coefficients (See appendix at the end of this chapter) between all predictor variables is produced. This displays the inter-relatedness of individual variables, and makes it possible to ensure that the set of variables being used do not exhibit excessive collinearity. It must be noted that all income-related variables are in 1989 Canadian dollars, and all land areas are in dunums (1 dunum=920 m² or 0.62 acres). Now that all the variables are defined, a remittance model by means of which the hypotheses can be dealt with is detailed.

5.9.2 The Remittance Model

The remittance model is developed in this section for the village of Lala. The dependent variable is remittances, that is, the amount of money received by each household from abroad in 1989. In the questionnaire survey, data for this variable were sought for each migrant son. However, heads of households expressed reservations about this question because they seemed to perceive it as "ranking their children" (to an outsider, the investigator) on the basis of money received from each. Moreover, remittances are sometimes sent as one cheque from two or three migrant sons hence it is not always possible, even for the recipients, to determine individual contributions.

As a result, the revised survey question became "how much money did you receive from abroad?" This encompassed all financial support received by the whole

household (almost always by the male head of the family), a figure in which respondents may or may not have included small gifts. Additionally, households that received less than one hundred Canadian dollars in 1988-1989 were ignored, so were similar financial or material gifts to household members.

The variables in the remittance model are organized into three categories, each of which captures certain aspects of the household or of emigrant son(s) that could affect the flow of remittances. The first category, land ownership, is intended to reveal the effects of land held per family on the amount of remittances it receives. This variable is disaggregated into TREE, CEREAL, and IDLND variables. The inclusion of these land variables allows a test of the hypothesis that migrants remit to inherit their parents' property.

The second category covers various characteristics of emigrant males which might affect their ability or willingness to remit. The number of years that each male had been abroad was recorded and later disaggregated into three categories: SAWY05, SAWY614 and SAWY15+. These variables respectively stand for the number of males who have been away for up to five years, 6 to 14 years, and over fourteen. These variables are meant to identify the effect of sons' time abroad on their adherence to the familial contract of remittances.

In order to measure a son's attachment to his village, NTRIPS records the number of trips to Lebanon made by a migrant son(s) from the same household.

The third category covers the characteristics of responding families, most of whom had benefited or continue to benefit from the process of migration. This will

determine whether the economic status of families affects the level of remittances they receive. The variable, domestic income (LBNY), is defined here as any "made in Lebanon income" in 1989. While this category includes income from agricultural sources, retail stores, private trade deals and the like, it naturally excludes remittances. Head of household age (HHHAGE) is also included. Observing how these variables affect remittances should provide some indication of a migrant son's commitment to and altruism towards his residual family members and aging (unproductive, hence possibly remittance-dependent) parents.

Migrants' earning (hence remittance) potentials were expected to differ from country to country. Therefore, because migrants' countries of destination (ie. SCN, SBRZ, SOTH) were expected to contribute to the remittance level, these variables were entered into the regression model of remittances. They were, surprisingly, found to make no significant contribution to prediction of the level of remittances received. Since these variables were highly correlated (with SAWY05, 614, 15+ variables), they were dropped from both remittance models.

Moreover, variables such as residual household size (HHSIZE, an indicator of family altruism) and the level of domestic income (LBNY, an indicator of a residual family's economic independence) were initially expected to affect migrants' remittance level. Theoretically, the area of unused farmland (IDLND) was expected to be inversely related to the level of remittances. These variables were entered into a hypotheses-testing regression model of remittances (Table 5.6) and were later dropped because they were found not to be significant.

All listed variables are observed over the complete data set of 124 households. The results of the regression estimation using ordinary least squares are presented in Table 5.6. In this table, B is the regression coefficient representing the value of the slope of the least square line. Because the independent variables in the equation are not measured in the same units, their coefficients are not directly comparable. Therefore, to make regression coefficients "somewhat more comparable", beta weights represent "the coefficients of the independent variables when all variables are expressed in standardized (Z-score) form" (Norusis 1988, 167). The t score is used to test that the corresponding coefficient is significantly different than zero. The last column (Sig. t) represents the two-tailed observed significance levels of each t score. Finally, outliers were tested for and they do not appear to seriously alter the results. That is to say, after running a regression model without certain outlying households, the results were not very different than those shown in table 5.6.

Table 5.6
A hypotheses-testing remittance model for Lala

Variable	B	Beta	t	Sig t
1) Land Categories				
TREE	139	0.28	3.2	0.002
CEREAL	-41	-0.19	-2.66	0.009
IDLND	6	0.04	0.53	0.600
2) Characteristics of Migrant sons				
SAWY05	58	0.02	0.19	0.844
SAWY614	966	0.41	4.4	0.000
SAWY15+	605	0.26	3.0	0.003
MSYRED	107	0.17	2.00	0.048
NTRIPS	395	0.17	2.09	0.039
3) Characteristics of Residual Families				
LBNY	-0.07	-0.1	-1.38	0.171
HHSIZE	-46.8	-0.04	-0.47	0.639
HHHAGE	-65.6	-0.25	-3.16	0.002
(Constant)	3420		2.62	0.010

$R^2 = 0.42$

Adjusted $R^2 = 0.38$

$N = 124$

A remittance-predicting equation is reached by using a stepwise regression approach, as opposed to the forced entry method which is used for the hypotheses-testing model (Table 5.6).

$$\begin{aligned} \text{Remittances}^{15} = & 2828^* + 138 (\text{TREE})^* - 41 (\text{CEREAL})^* + 983 (\text{SAWY614})^* \\ & + 597 (\text{SAWY15+})^* + 410 (\text{NTRIPS})^{**} \\ & + 108 (\text{MSYRED})^* - 59 (\text{HHHAGE})^* \end{aligned}$$

¹⁵

* Significant at $t < 0.01$ ** Significant at $t < 0.05$

$R^2 = 0.39$ The adjusted $R^2 = 0.37$ $F = 19.2$; Sig $F = 0.000$

The variables in the model for hypotheses testing (Table 5.6) and in that for predicting remittances explain 42% and 38% of the variance of the dependent (remittance) variable which is accounted for by eleven and nine independent (predictor) variables, respectively. This level of explanation is deemed acceptable for two primary reasons: the survey is a cross-sectional view of the village where some intangible factors may affect the results. For example, farming skills of households, the motivation of emigrants, and their speed of assimilation abroad are factors that are difficult to measure and vary between households, and yet they could affect the sending family's income and emigrants' level of commitment to it.

Now that the model's variables have been defined, what does this model reveal?

5.9.3 Remittances Over Time

As mentioned above, the number of sons who have been abroad for certain number of years (SAWY05, SAWY614, and SAWY15+) are used as surrogates to test migrants' commitment to the familial insurance contract and their ability to remit.

There is a low level of annual remittances in the early period (SAWY05) of emigration. The fact that its parameter is non-significant means that we cannot reject the null hypothesis that migrants send no remittances in the first 5 years. In other words, we can say that these migrants remit, if at all, at low levels, a behaviour that reflects their economic instability in the initial phase of migration when they struggle to find and keep jobs, and to get established in their new place of residence.

The level of remittances rises once migrants are established, 6 to 14 years after their departure as indicated by SAWY614. In this stage migrants are established and more comfortable economically with a greater capability and propensity to remit to their parents. This variable, unlike the previous one, is highly significant indicating that the null hypothesis (migrants do not remit) is rejected.

Similarly, SAWY15+ is a significant variable thus indicating that the null hypothesis (ie. migrants do not remit in this period) can be rejected. In other words, a decade or two after emigration, migrants continue to remit.

To determine the difference in the level of remittances between two periods of migration, households were segregated according to the number of migrant sons they have in only one migration period. Hence households with migrant sons in both the early and intermediate migration periods were ignored. A difference of means (t) test was then carried out between (1) migrants in the early (SAWY05) and intermediate (SAWY614) periods of migration, (2) those in the early and late (SAWY15+) periods, and between those in the intermediate and late periods.

The t test results indicate that sons in their intermediate phase of migration remit more than those the earlier phase¹⁶. However, while there is a significant difference between the early level of remittances and the late level¹⁷, there is little

¹⁶ t value=1.9, degrees of freedom (d.f.) = 43, and the 2 tail probability = .064.

Remittances from migrant sons who had been away for up to five years (SAWY05) and between 6 and 14 years (SAWY614) average \$1893 and \$3250 per year, respectively.

¹⁷ t value=2.33; d.f.=43; 2 tail probability=0.024.

Mean remittances received from sons in their late period of migration (SAWY15+) is \$3036, an amount that is slightly less than that received in the intermediate period.

change in the amount remitted after fourteen years of emigration¹⁸.

The latter finding reflects migrant children's long term commitment to their parents. The slight drop in remittances may indicate waning altruism over time (Stark and Lucas, 1988), reference group substitution¹⁹ (Philpot 1970; Lucas and Taylor 1989), and the fact that the once-single migrant is by now married with greater levels of responsibilities and investments in his family of procreation (Russell 1986). However, this drop in remittances is not as marginal as it seems especially when one accounts for the fact that the total number of migrant sons in the SAWY15+ category is larger than those in each of the other two, and that migrants in this category are likely to be established and earning higher incomes than others. A closer look at *individual* migrants' remittances with respect to their years abroad is an area that requires more research (see chapter 6 for details).

The finding of this section, therefore, agrees with Stark and Lucas's (1988), and Lucas and Stark's (1985) findings, and with the hypothesis of this research that the level of remittances is low in the initial stages of migration, it then peaks only to slightly drop with time.

5.9.4 Remittances and Land Ownership

In an earlier regression estimate when a single variable representing the total area of land owned by each family in 1989 was entered into the regression, its effect

¹⁸ t value = 0.33; d.f. = 43; 2 tail probability = 0.74

¹⁹ Reference groups affect the norms, attitudes and values of migrants, thus their propensity to remit. A more complete explication is provided towards the end of this chapter.

on remittances was negative and bordering on significance. Land ownership was then disaggregated into land in trees, land in cereals, and idle land, with the first being by far the smallest in area when compared with the other two. Given these facts, the model (Table 5.6) suggests a negative relationship between the land area a family owns and the level of remittances it receives from its migrant son(s). This appears to contradict the hypothesis which casts migrants as greedy, remitting partly because the material benefit (inheritance) to themselves outweighs the costs. Philpot (1968, 473) concurs with the finding in this research because in his Caribbean case study he found

"no marked difference in remittance patterns between areas of small landholders and those where people are landless. In some cases the children of those holding a good piece of land are notorious for their default in remittance".

This lack of interest in family land is due to the fact that (1) agriculture is economically unrewarding especially in Lala, and (2) it is a sector which the youth, and certainly returnees with all their elevated social and often economic status, want to avoid. (3) Agriculture is also unrewarding, in terms of social stature and power. (4) Land in many families is undivided making individual pieces unsaleable. In Lala, over one third of surveyed families are yet to divide their land. (5) In some cases there are numerous owners (some of whom might be dead or abroad) of a piece of land, making it unattractive to build a house on²⁰. Finally, (6) a large number of

²⁰ For example, a well to do resident of Lala who had returned from Columbia, built a large and luxurious house on an inherited plot for which he had paid to have transferred to his name. Years after the house was built, a distant female relative "legally" claimed her small share in the site which she did not want to sell. The home owner had to eventually give her part of his fenced garden.

migrants do not return because they either become assimilated and comfortable in their adopted countries or they do not succeed economically and are thus unwilling (because of the social stigma) or, in some cases, financially unable to return.

The preceding analysis rejected the proposition that migrants remit to inherit their parent's property, and confirmed that migrants' remittances do not appear to cease with time. Additionally, the fact that remittances are negatively related to household (domestic) income (See Table 5.6) suggests that remitters are responsive to their families' needs.

In a later section entitled "Number of Migrant sons and Remittances", the theoretical expectation that households with two or more migrant sons derive lower levels of remittances is shown *not* to hold. These findings, including migrants' financial commitment to their family of orientation decades after emigration, are all consistent because they suggest that altruism is a much stronger force in family relations than covetousness thus casting serious doubt on the theorized self-serving nature of migrant children.

5.10 DOMESTIC INCOME IN LALA

In the remittance equation above, domestic income (LBNY) is a non significant variable thus appears not to affect the flow of remittances. In spite of this and the heavy flow of remittances to Lala, not every household receives remittances. This raises the question: What are the sources of LBNY? Does the process of migration and remittances affect the generation of income domestically?

The technique of multiple regression is used here to develop a domestic

income (LBNY) model where a number of variables that may contribute to LBNY can be considered at once.

The dependent variable in this model is domestic income. It stands for that aggregated portion of a household's income that was earned in Lebanon in 1989, converted to Canadian dollars. Some households had more than one source of domestic income. For example, a child might be employed and earn an income from a non-family source. If such a child was living in his or her parents' home, such an income was included in LBNY. All variables are observed for all 124 surveyed households in Lala.

Table 5.7
Domestic Income Equation for Lala

VARIABLES	B	Beta	t	Sig t
1) Types of Land Use				
CEREAL	-65	-0.22	-2.7	0.008
IDLND	-49	-0.21	-2.4	0.017
TREE	388	0.66	7.5	0.000
2) Characteristics of Households				
HHAGE	-43	-0.12	-1.3	0.200
HHSIZE	319	0.19	2.2	0.029
3) Returned Migrants				
RMTSTRBLD	234	0.05	0.73	0.460
TLRTMIG	-1536	-0.18	-2.22	0.030
(Constant)	2135		0.86	0.394

 $R^2=0.43$

Adjusted $R^2 = 0.39$
 $N=124$

A domestic income-predicting equation is reached by using a stepwise regression approach, as opposed to the forced entry method which is used for the general model above (Table 5.7).

$$\text{Domestic income}^{21} = -1342^{**} + 383 (\text{TREE})^* - 45 (\text{IDLND})^* \\ - 53 (\text{CEREAL})^{**} + 410 (\text{HHSIZE})^*$$

²¹ *

Significant at $t < 0.01$ ** Significant at $t < 0.05$
 $R^2=0.400$, and the adjusted $R^2=0.38$. $F=18.5$

Variables in this model of domestic income (Table 5.7) are organized into a number of categories designed to capture the various factors that affect it. The first category includes three types of land use. The second category consists of household characteristics, including the age of the head of the household (HHAGE) and current household size (HHSIZE, ie. non-migrant family members). The younger family head's (respondent's) parent or parents are sometimes included in this figure. The third category includes the total number of returned migrants (TLRTMIG), a variable that is meant to capture the cash-rich returnees contribution to domestic income. Additionally, RMTSTRBLD is meant to explain the effects of remittances (which are invested in stores and apartment buildings) on domestic income.

The domestic income model (Table 5.7) reflects the significance of orchards (TREE) in boosting a household's domestic income in Lala. In spite of the fact that the area of land in cereals is much larger than that in trees, the latter produce far more lucrative crops thus a number of farmers in Lala are gradually converting their cereal land into orchards. This conversion to less labour intensive crops is also due to the emigration of the youth. The village's growing dependence on remittances has made it possible for farmers to have the capital needed for such an investment and to be able to forego the land's earnings until the trees bear fruit.

The land that is devoted to cereal production is largely utilized for growing wheat, a non-lucrative product that usually earns a low market price primarily because of government control of its market price. In addition to that, wheat and other cereals are still labor-intensive crops which makes them undesirable to grow.

The negative sign of CEREAL is probably due to the fact that wheat is grown in Lala largely for subsistence rather than market (cash income) purposes. Some farmers who are abandoning agriculture and strongly feel that farming is a losing sector have said on a number of occasions: "We (our family) have always produced our own bread. Even if it is not cost effective, I can't bring myself to *purchase* my own daily bread needs."

Household size (HHSIZE) is a significant variable which is positively related to domestic income. This is likely due to the largely labor-intensive nature of agriculture. The larger the size of the family, the more able it is to carry out agricultural activities which constitute an important (mostly for subsistence) sector in Lala's economy. Another reason is the growing employment opportunities for Lala residents in the village or in nearby towns and villages. This is partly due to the proliferation of cars carrying people daily to job sites that, just over one decade earlier, were considered distant and inaccessible.

The total number of returned migrants (TLRTMIG) who constitute about one third of surveyed households do not appear²² to affect domestic income. This is surprising because migrants return usually after having accumulated substantial capital. The negative relationship between TLRTMIG and domestic income is due to the fact that many returned migrants have wealth and not income (ie. wealth which they do not invest in income-generating enterprises). Besides, the political turmoil in Lebanon suppressed and stifled their appetite for investment thus forcing

²² In the stepwise model, TLRTMIG is significant at a $t=0.080$

many to live off their savings. Others make annual trips abroad where they work for few months and return to Lala with enough spending money for the rest of the year. Neither sources of livelihood were counted as remittances.

It is natural enough to find domestic income negatively related to the age of the head of the household. The older he is, the lower is his income from agricultural and business sources.

Remittances invested in apartment buildings and stores (RMTSTRBLDG, to the exclusion of family homes) which were expected to contribute to domestic income is found to be non significant. One plausible explanation is that investments in these two sectors, especially in apartment buildings, are not currently lucrative enterprises. Apartment buildings have not been a good investment since the civil war and the subsequent collapse of the Lebanese currency. Moreover, Lebanon's rent laws fix the rent and make the annual tenant an almost permanent occupant²³ of the premises. These factors made monthly rents (in 1988-1989) total less than the cost of travelling from Lala to Beirut (where most of the buildings are located) once a month to collect the rent. Therefore, owners were forced to collect the rents once every two or three months.

While some of the larger retail stores reported in the survey are located along the Beirut-Damascus highway (along the Shtura-Masna' area, some thirty kilometres north east of Lala), the majority are located in Lala where the market is very small and sales are limited. In fact, of some fifty stores and business in Lala, six to ten

²³ There are two types of leases in Lebanon: annual and seasonal (even monthly) leases. Only tenants with annual leases have this quasi-ownership privilege.

suspend their operations for extended periods, sometimes for over one year.

5.11 MIGRATION AND REMITTANCES: MOTIVES AND IMPACTS

The preceding sections on remittances and domestic income in Lala are expanded by a discussion of whether having more than one migrant son affects the allegiance and commitment of subsequent migrants to their familial insurance contract (to remit). The issue of whether migrants remit for the purpose of investing and later returning to their home villages is also addressed. Both these questions affect the economic development of the village, an issue which is elaborated upon further in a section entitled "Migration and Remittances: An Impact Assessment". Therefore, this section brings some of the preceding ideas into a sharper focus and assesses the effect emigration and remittances are having on the rural economy.

5.11.1 Number of Migrant sons and Remittances

The finding that there is no relationship between land ownership by a family and the level of remittances it receives, has further theoretical support. One important remittance-inducing and "binding" factor for a migrant sibling is the implicit contract between him and his family. The family incurs transportation and urban subsistence costs and expects a return on its investment insurance. However, the common practice in Lala and elsewhere has the first migrant son insuring the second by paying his transportation costs (Philpot 1968) and by providing him with food and shelter until he finds employment (SyCip and Fawcett 1989). In addition to this, the presence of relatives and friends in the destination area reduces the psychic costs of additional migrants (Stark and Taylor 1989). This supportive

behaviour of family abroad is usually repeated when more male or female²⁴ members of the family emigrate.

Furthermore, the internal income differential in a Less Developed Country is likely to be less pronounced than that between it and a more developed country. For example, a Lebanese family that sends a migrant son to an international destination like Canada offers him little if any real insurance for two main reasons. On the one hand, the greatly devalued Lebanese currency makes it almost impossible for many Lebanese families to be able to support (insure) a son in a Western country where the standard of living is much higher than that in Lebanon. In other words, families can not insure the international emigration of a son because the cost of living in, say, Calgary, Edmonton or Toronto is much higher than that in urban or rural Lebanon.

Looking at this case study one notices that, for example, of those Lala households with migrant sons, 74.19% have more than one away and 49% of all migrant sons choose Canada. Additionally, the emigration of a son (especially a second son) to a country like Canada with its well established and universal social welfare system allows the new migrant greater independence from his family of orientation. Therefore, one can plausibly argue that *only the first migrant son* is insured by his family hence his "obligation" to recompensate them. Should then the level of remittances received by a family not increase with the emigration of the second migrant son?

²⁴ Unmarried females very rarely emigrate without the company of their parents.

Data from Lala make it clear that a household with two migrant sons is more likely to receive remittances than a household with one, and less likely than that with three or more migrant sons. The table below makes it clear that the more migrant sons a family has, the higher are the chances that its migrant sons would abide by the implicit contract, thus remitting.

Households with one migrant son abroad seem to have a high number of defaulting sons (10 out of 23) (See Table 5.8). This is due not to a lack of commitment to a family contract but to the economic instability of migrants due to their recent arrival at their new destination. However, this default is almost non-existent (1 out of 36) for households with three or more migrant sons. As the default rate drops, the average amount of remittances received by households with 3 or more migrant sons is about double that received by those with one.

Table 5.8

Remittance-receiving Households and Their Average Annual
Receipt of Remittances in 1989: Table Organized by Number of
Migrant Sons per Household

Number of Migrant Sons	Lala	Khirbit Kanafar	Lala	Khirbit Kanafar
	Households Receiving (and Not Receiving) Remittances		Average Amount Received in CN\$ per Year	
0	16 (15)*	0 (50)*	1043**	0
1	13 (10)	3 (14)	1539	228
2	27 (7)	2 (16)	1923	8.6
3+	35 (1)	2 (3)	2947	170
Total	91 (33)	7 (83)	239,250***	4.885***

Figures in brackets are households not receiving remittances.

This represents households that receive remittances from emigrant brothers. This is either traditional family remittances or, more typically, financial returns from a business(es) which the head of the household had established while abroad.

Total remittances received by all the households that were surveyed.

Years after emigration, altruism of the first migrant son is usually on the wane (Stark and Lucas 1988). Philpot (1968 and 1970), however, attributes that to migrants' adoption of a new reference group with its different norms and values. Thus the arrival of the second migrant son acts to re-stir and re-stimulate feelings of family unity and responsibility. At this stage, a family has two (or more) contracts to be fulfilled, one being new with a longer time horizon than the (renewed) other.

Data from Khirbit Kanafar should be considered with prudence. For one thing, a very small number of families receive remittances. For another, amounts remitted are very small compared with those sent to Lala. This question of deficient remittances to Khirbit Kanafar will be dealt with in a coming section.

The distribution of family property is usually done by the family head who has the last word. The non-remitting son is implicitly under the threat of discipline especially if he does not know in advance when bequests are to be made. In Lala, siblings usually know "in advance"²⁵ when bequests are to be made, but they also know that bequests can be and are frequently changed. Therefore, if remittance is a migrant son's strategy to maintain favour in inheritance, it must be independent of the family head's age (Stark and Lucas 1988). The remittance model's regression estimate indicates that the family head's age is negatively related to remittances received. In other words, the older the family head is, the lower is the level of remittance, a finding that disagrees with the above mentioned premise.

In conclusion, the theoretical expectations of siblings remitting to inherit and

²⁵ Only when the head of the family ages or becomes ill.

of lower levels of remittances with two or more migrant sons does not hold. This lends greater support to the supposition that a sibling remits to his family more out of altruism than covetousness.

5.11.2 Remit to Return?

Remittances are shown to be related²⁶ to the number of trips home that a migrant makes. This supports Stark and Lucas's (1988) assertion that a migrant remits so the receiving family facilitates his visit or permanent re-settlement in the village.

Theoretically, emigrants are said to remit because they desire to invest through residual family members after which they return to their village. It is worth repeating that remittances sent for home construction or for other investment activities are not included in the remittance category. Many investments in homes, buildings and stores were made over an extended period of time; other investments occurred over twenty years ago. This is the reason for not specifically asking a question about the real amount invested in various sectors.

²⁶ $\chi^2=12.72$, d.f.=4, and $\alpha < 0.025$. This relationship is just as prominent in the remittance model (See Table 5.16).

Table 5.9

Investment and Returned Migrants: Lala

Returned From:			Invest in:		
Brazil	Columbia	Canada	Apt Bldg	Store	N/A
19	5	17	17	19	5

N=124

Data show that 41 of the surveyed families (or heads of households) who had lived abroad are now permanent residents of Lala (Table 5.9). While the survey did not ask if migrants' investments were made before or after their return, the observed trend points to migrants remitting to their family of orientation which oversees the construction of a house for the sender or, more rarely, for the family of orientation itself. In the latter case, the remitting migrant usually inherits much or all of the newly-built house.

When asked whether their migrant sons will be remitting in the coming year (1990) for a specific purpose, 20 heads of families reported that they would receive money either to build or complete building a home for their son (Table 5.10). This lends support to the observation that migrant sons remit for house construction before returning to the village.

Table 5.10

Some aspects of remittance use in Lala

Areas Where Remittances Are Invested in:	Will Receive Remittances To:	Received Remittances To:
	(1989-1990)	(Pre 1989)
Build House for Head of HH	2	42
Renovate Head of HH's House	4	42
Expand Head of HH's Home	3	22
Build House for Son	11	27
Buy Furniture	5	58
Complete Son's House	9	N/A
Households affected by remittances in Lala is 97 (N=124)		

Once a migrant's home is completed, he returns with his family at a time that is advantageous to them or the house is left vacant for long periods of time. An emerging trend among Lala migrants is to consider the completed house as a summer retreat ("cottage"), and as a physical structure that will, it is hoped, attract and attach migrants' foreign-born children to their parents' homeland. Migrants visiting Lala in the summer of 1989 and others living in Canada said that they are building a home in the village to (1) satisfy the "older ones" (ie., their parents) who "can keep it", or to (2) leave a monument which speaks to their commitment and attachment to their parents' village.

Khuri (1967, 211) concurs by stating that considerable capital is invested in big and costly homes in the Christian village of Douma turning it into what he calls a "graveyard of houses." A more recent study of Pakistani emigration by Ballard (1989, 115) pointed out that "many (of the newly-built) houses are locked up, and only reopened during their owners' increasingly rare visits to their homes".

In conclusion, it appears that migrants remit to first build their own abode, then they either move into it permanently or they use it as a summer retreat. This finding, while not definitive, strongly indicates that a migrant's home construction is supervised by members of his family of orientation thus confirming one of Stark and Lucas's (1988) remittance-inducing (or contract-abiding) factors between a migrant and his family.

5.11.3 Emigration and Remittances: An Impact Assessment

In the questionnaire survey, households were asked whether remittances had assisted them in any of the categories listed in Table 5.11. The same categories were used to check if remittances were expected in the following year (1989-1990) for the purpose of assisting in these respects. The table below (Table 5.11) reflects a strong interest on the part of remittance-receivers to invest in the traditional source of livelihood, agriculture. There is, however, a definite abandonment of agricultural land as reflected in the three fold increase in idle land between the 1970s and 1989 (See Figure 5.2). Thus, while remittances are being invested to improve the agricultural sector, it is important to note that it is being applied to a rapidly shrinking parcel of land. As the domestic income model indicated, there is a negative relationship between cereal crops and domestic income, and a positive but not significant one between investments in stores and apartment buildings. Additionally, cattle, sheep and goats, once commonly found in most households, attract the least amount of investment, and only then by the older generation (older heads of families. Two columns in Table 5.11 classify remittance investment by the age of the head of the household).

FIGURE 5.2 Land use in Lala and Khirbit Kanafar

Table 5.11²⁷

Remittance Use in Lala

	Number (%)	Head of Households Age	
		60+ (%)	< 60 (%)
Improve Land	52 (53.6)	29 (56)	23 (44)
Buy Fertilizer	56 (57.7)	32 (57)	24 (43)
Buy Domestic Animals	30 (30.9)	19 (63)	11 (37)
Buy Land and Machinery	17 (17.5)	8 (47)	9 (53)
Buy Furniture	58 (59.8)	23 (40)	35 (60)
Buildings and Stores	29 (30.0)	10 (34)	19 (66)
Pay Debts	71 (73.2)	23 (46)	38 (54)
Educate Children	58 (59.8)	25 (43)	33 (57)
Number of households receiving remittances is 97.			

²⁷ Data for this table were obtained from questions to which the answers were either "yes" or "no".

The aging population of Lala, largely due to emigration of the youth, is another reason for the decline of the village's agriculture. Household heads over 60 appear to be more keen than those below 60 to (1) invest some remittances to improve agricultural productivity through the use of fertilizers, building of terraces, and deep ploughing and so on (Table 5.11). They are also keen to (2) maintain some level of self-sufficiency by the purchasing of cattle, sheep and goats.

A large number of families (58) have used remittances to educate their children. However, migrant sons' years of education (MSYRED) has a correlation coefficient of 0.025 with early emigrants, 0.223 with intermediate (6-14) emigrants, and 0.312 with recent emigrants. This implies that, while remittances are boosting the level of education, emigrants are increasingly better educated.

Many returnees had purchased apartment buildings in pre civil-war-Beirut, and have been establishing retail stores in Lala and in near by towns, investing in real estate, and building themselves homes in the village. It is noticeable that such investments are done by returnees themselves (not by their parents or relatives), and such investments are increasing in neighbouring towns and small cities in the Bika'a (not in Beirut) where business opportunities are thought to be greater, a phenomenon that is not unusual (Lipton et al. 1977).

5.12 THE EMERGENCE OF THE REMITTANCE ECONOMY

What is quite striking about Lala is its great reliance on remittances as a source of income for a large number of village residents. Some ninety seven out of 125 sampled households in Lala receive remittances. This dependence seems to have

driven the people off the land (Figure 5.2) and created an ideology of emigration where a young man is more or less "expected" to "emigrate to become a man", and/or to join a brother or an uncle who in a way form the potential emigrant's family in (a chosen) exile.

People are abandoning farming at a rapid pace, a confirmation of which is the four-fold increase in idle land in less than two decades. The area of idle lands in Lala skyrocketed from 452 dunums in early 1970s to 1715 in 1989, with land in cereals bearing the biggest loss as its area dropped from 2273 dunums to 895 dunums in the same time period. The area of land in trees rose slightly over the years from 706 dunums in 1970s to 745 in 1989. This slight rise is due to four factors: (1) the increased income from remittances makes an investment in trees feasible financially and in terms of the time lag required before they bear fruit. (2) Fruit trees are typically more lucrative than cereals. (3) Lala residents seem to have developed a greater sense of "leisure" because they are converting small portions of their land from grain production to the less labour intensive orchards. Moreover, (4) labour-saving technologies are being used wherever possible. This has resulted in the abandonment of lands that are rocky, too small for the tractor to plough and seed, or lands that are inaccessible to farm machinery.

Many respondents said that they neglect mountainous or distant (within village boundaries) patches of land, and concentrate on near-by and easily accessible pieces. This point about a greater sense of leisure is also confirmed by the fact that most Lala farmers work from before dawn until ten or eleven in the morning, while

those from Khirbit Kanafar work from dawn to dusk. The sense of dependency on remittances is developing quite strongly in Lala where a number of young and able men refuse to do manual²⁸ labour because they do not have to.

Lala migrants are increasingly building homes in the village and treating them as summer retreats ("cottage"), and as physical structures that will, it is hoped, attract and attach migrants' foreign-born children to their parents' homeland. This home-construction activity is having a positive but small impact on the village's economy because a large number of skilled and unskilled workers²⁹ and contractors are from nearby villages and towns.

5.13 THE KHIRBIT KANAFAR CASE

In spite the emigration of 37% of the sons of all families interviewed in Khirbit Kanafar, residual family members receive almost no remittances. Merely seven out of the surveyed 90 households receive remittances from their children. Even then, only two receive more than \$2000 Canadian dollars annually with a village average of CN\$54 per household per year and a sample total of CN\$4885, as opposed to Lala which receives CN\$1929 per household and CN\$239,250 in total (See figure 5.3).

²⁸ There is a social stigma associated with manual labour, especially for households receiving somewhat more remittances than others (a sign of family success abroad) which gives them a sense of elevated social status.

²⁹ There appears to be a shortage of unskilled labour in Lala because farmers are increasingly relying on non-village labour. This is a major shift from the time when Lala residents used to seek work beyond their village.

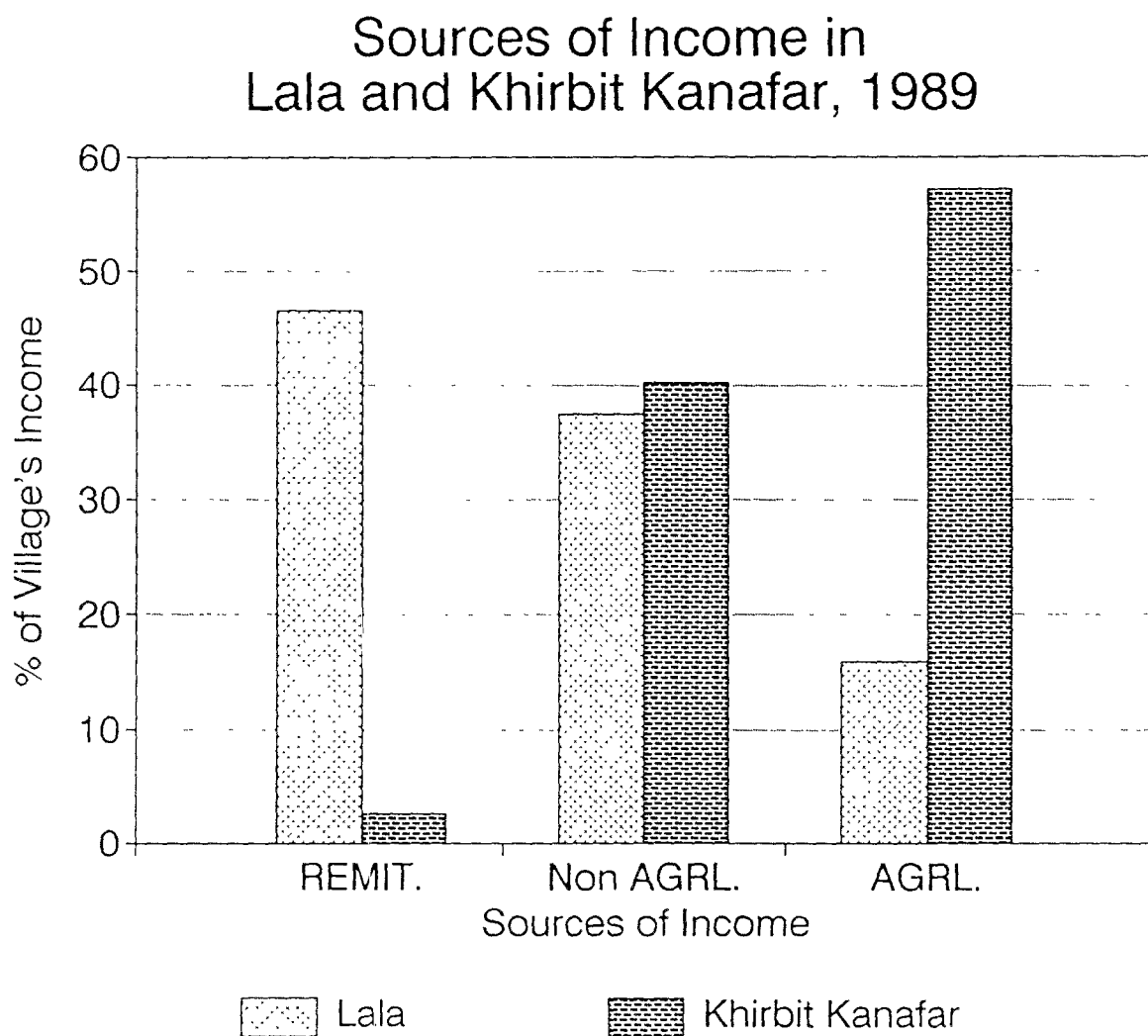


Figure 5.3

Sources of Household Income

This phenomenon is even more peculiar when seen in its regional context where, for example, Khirbit Kanafar and Lala are similar in size, economic base, accessibility to information and urban areas. Why then do migrants from the latter village abide by the implicit insurance contract and remit to their residual family while those from the former do not?

A number of factors explain this phenomenon of migrants not remitting to their families. The majority of emigrants from Khirbit Kanafar go to internal destinations such as Beirut and the Christian enclave north of the capital city; a much smaller group emigrate internationally to North and South America. Families in Khirbit Kanafar are far more nuclear and independent-minded in their lifestyle than those in Lala, thus they are less likely to pool their resources and provide each other with insurance as a protection from uncertainty and adverse events. Therefore, Khirbit Kanafar migrants choose internal destinations because they are less costly and risky than international ones, despite the fact that the former has lower expected returns (Stark and Taylor (1989) and Schaeffer (1991) have similar findings). Although this explanation falls within the theoretical realm of this research, there are other historical, locational, and civil war-related factors that can further illuminate this pattern of remittance-free internal migration from Khirbit Kanafar.

Christians in Lebanon have traditionally been a privileged group who are allocated a disproportionately greater number of civil servant jobs compared to those earmarked for Muslims in the country. Because most such jobs are located in urban areas, Christians from Khirbit Kanafar who sought these high-paying jobs emigrated

internally. Furthermore, during the protracted civil war, the Christian enclave attracted many of Lebanon's Christians. This was due to its tranquillity where public and private institutions did not seem affected by the war. Additionally, bursts of war, skirmishes, and non-violent (sometimes perceived) tensions in Muslim dominated areas led many Christians (some from Khirbit Kanafar) to choose this enclave. In 1989, most of it was controlled by Samir Jaja's (Christian) Lebanese Forces and a smaller part by Michele Aoun's Lebanese army units.

The emerging picture here reflects Khirbit Kanafar residents as having strong contacts with urban areas that continued throughout the civil war period. The contacts appear to have influenced the lifestyles of the people of Khirbit Kanafar and loosened their family ties. Samir Khalaf (1987, 162), a prominent Lebanese sociologist, asserts that

"virtually all family systems, regardless of their diversity, undergo some decline under the impact of urbanization and industrialization. With or without a high degree of technological change or impersonal forms of association, urbanization is almost always accompanied by the *disassociative processes of secularization, individuation, and socio-cultural differentiation*" (emphasis added).

The attraction of the Christian enclave was shattered during a two-year period (1988-1990) when three fierce battles erupted, two of which were fought inside this Christian held territory. The first round was between Aoun's forces and those of Jaja; the second, between Aoun's army units and those of Syria who were stationed just outside the enclave; and the third, once again, between Aoun's army units and those of Jaja, a battle that was described by many as the civil war's most vicious and

destructive battles. In 1990, almost one year after the survey was completed, there were news reports that immigration laws of a number of Western countries (including Canada) were eased to accommodate those who fled the Christian enclave to Cyprus on their voyage elsewhere. In addition to this induced wave of international emigration of Lebanon's Christians³⁰, many of Khirbit Kanafar's internal migrants were said to have returned, probably temporarily, to the safety of their village.

Some of these returnees were members of the Lebanese Forces (Phalangists) militia who had cooperated with Israel during its 1982-to-1985 occupation of the Western Bika'a administrative unit. When Israel ended its occupation of this area, many collaborators fled the area. However, their peaceful and unhindered return in 1989 to their village is likely to regenerate their faith in Muslim-Christian coexistence.

Another important explanation for the lack of remittance from Khirbit Kanafar emigrants to their families has to do with the geo-ethnic³¹ location of the village. In the centre of the Western Bika'a administrative unit, the population of Khirbit Kanafar is Christian and similar to the five neighbouring villages which are located along the western side of the Bika'a valley. Muslim villages are found along the eastern side of the valley, as well as to the north and south, thus surrounding the

³⁰ International emigration of Lebanon's Christians is not a recent phenomenon. Rather, it is unusual that people from Khirbit Kanafar emigrate primarily to internal destinations. A strong widespread desire to emigrate to the West was felt during the field season, but many seemed to lack the finances or the necessary contacts to do so.

³¹ Defined in the previous chapter.

Christian villages and Khirbit Kanafar. In spite of the heavy political and military activities of Muslim villagers south of the Christian villages, villages in that whole area had gone through the civil war years living harmoniously with no real explicit or conscious tensions.

During Lebanon's post-independence "golden era" (late 1960s to mid 1970s) Khuri (1967, 210) wrote that the country's Christians felt, consciously or unconsciously, threatened "of being swamped by a Muslim majority." Although Christian villagers in the Western Biqa'a have not been directly threatened by their Muslim neighbours, they "feel like guests in the area", as Khirbit Kanafar's high school principle said to this researcher, implying that their stay is not a permanent one. This remark has to be understood in the context of the political debate over the cantonization of Lebanon, and in the context of Lebanon's civil war which resulted in the peaceful and sometimes forced transfer of religious "minorities" away from certain areas. In fact, it is a dominant perception that if Lebanon were to be cantonized, the Western Biqa'a administrative unit would likely be part of the Shia canton. As a result, minorities like the Christians of Khirbit Kanafar will likely move away or be transferred, and the Muslim Sunni of Lala will be tolerated.

The sectarian nature of the civil war amounted to an assault on the pluralistic way of life which had been fostered over the years. It damaged Muslim-Christian coexistence and the feelings of mutual trust and tolerance that were developing. During the war, according to Khalaf (1987, 283), "Quite often, in reaction to confessional hostility elsewhere, the fears and apprehensions of Christians are

provoked..." leading many families to leave the area.

All these developments and factors appear to have made it easier for Khirbit Kanafar migrants to develop a sense of detachment from their village, a sense that does not seem to exist amongst Lala migrants. Further evidence of this sense of detachment is reflected in Khirbit Kanafar's international migrants lack of interest in registering their children as Lebanese citizens, something that is very widely practised by those from Lala.

Therefore, Khirbit Kanafar migrants do not feel secure about the future of their village which explains why they do not abide by their insurance contract and remit to their residual families to maintain a good reputation to facilitate their reintegration in the village once they return or visit. The sense of insecurity about the future makes the village an unattractive place for migrants to invest their capital, thus the role of families is further weakened because they are not needed to facilitate their children's return and re-integration, nor their village investment.

5.14 DOMESTIC INCOME IN KHIRBIT KANAFAR

Because Khirbit Kanafar does not receive remittances, understanding the various factors that affect the village's domestic income is somewhat more important than for Lala. In this section, multiple regression analysis is used to integrate all the variables that influence domestic income in Khirbit Kanafar, and to have a sense of the contribution of each.

Table 5.12

Khirbit Kanafar's domestic income model

Variables	B	Beta	t	Sig t
1) Land Use Variables				
TREE	175	0.45	5.40	0.000
CEREAL	80	0.41	4.79	0.000
IDLND	11	0.21	0.24	0.81
2) Household Characteristics				
HHSIZE	-146	-0.11	-1.12	0.27
HHHAGE	-59	-0.31	-3.2	0.002
(Constant)	4945		3.36	0.001

The value of R^2 is 0.44 Adjusted $R^2=0.41$ $N=90$

A domestic income-predicting equation is reached by using a stepwise regression approach, as opposed to the forced entry method which is used for the general model above (Table 5.12).

$$\text{Domestic income}^{32} = 3768^{**} + 178 (\text{TREE})^* + 76 (\text{CEREAL})^{**} - 50 (\text{HHHAGE})^*$$

³² * Significant at $t < 0.001$ ** Significant at $t < 0.01$

$R^2 = 0.43$, and the adjusted $R^2 = 0.41$ $F = 21.7$; Signif $F = 0.000$

Household domestic income is the dependent variable in this model. Like the previous two regression models, variables here are grouped into categories (Table 5.12). The first category consists of land use variables, and the second category is household characteristics. All variables have been defined earlier and are observed over all sampled households in Khirbit Kanafar.

As reported earlier in this chapter, Khirbit Kanafar families have fewer children, a large proportion of the village's youth emigrate to Beirut, and farmers employ agricultural technology more than those in Lala. There is a negative relationship between household size (HHSIZE) and domestic income. While not much can be said about this relationship because it is not a significant one, it can be said that Khirbit Kanafar residents are by and large dependent on domestic income (partly because they receive no remittances). Because they rarely have an external source of income, the larger the number of children in a household, the greater is their drain on domestic income. It should be noted that urban migrant siblings frequently visit the village in the summer time to get their supplies of fruits and vegetables.

The state of agricultural activities in Khirbit Kanafar appears to be dissimilar to that in Lala. Land in trees (TREE) and grain (CEREAL) in Khirbit Kanafar are positively and significantly related to domestic income reflecting the significance of agriculture in the village's economy. Numerous households depend on their orchard farms (and/or cereal production) for their annual and perpetual income. These factors reflect Khirbit Kanafar's reliance on agriculture as a primary source of

income, a situation that is contrasted with Lala where agricultural lands are being abandoned and a greater dependence on emigration and remittances is emerging.

The age of the head of household (HHHAGE) is negatively related to domestic income which reflects the reality that the older the heads of households, the less able they become to carry out farming and other strenuous activities. However, this researcher observed a clear difference between elderly's effort in the agricultural sector in each of the villages. There appears to be emerging patterns of agricultural abandonment and "early retirement" in Lala where people are becoming increasingly dependent on remittances. This is particularly true for those who emigrate and return with their accumulated wealth and elevated social status at a relatively young age. Many others in Lala are being supported quite well from abroad which creates a disincentive to work. These factors are non-existent in Khirbit Kanafar where, unlike Lala, it is normal to see elderly men and women working their fields.

In summary, there are a number of cultural, political and geo-sectarian reasons behind the absence of remittances to Khirbit Kanafar, a village that continues to rely on its agricultural sector. As for Lala, it can be said that Stark and Lucas's work, the only theoretical framework available on this issue of migration and remittances, makes it possible to develop and test hypotheses. Some of these hypotheses, like the continuation of remittances over time are confirmed, while that regarding the assumed self-serving nature of migrant sons is rejected. Stark and Lucas's work provides an initial theoretical skeleton that needs further testing.

modification and expansion.

5.15 SUMMARY AND DISCUSSION: AN EXTENDED MODEL OF FAMILY INCOME AND REMITTANCES

To summarize this discussion of theory of migration and remittances, the following graph (Figure 5.4), based on the work of Stark and Lucas, is offered to capture the main characteristics of their theory and to extend its scope based on the findings of this research. The graph depicts the effect of migration and remittances on the residual family over time. The graph is divided into five stages each of which is expanded upon in this section.

Stage I of the graph depicts household income as steady or declining slightly due to dire economic straits. The carrying capacity of the land may have been reached, or the region's farming sector may suffer due to climatic, economic or political vagaries. The head of the family may decide to increase his/her income by adopting new agricultural techniques, by improving the quality of the land, or by adopting methods that assist in preventing or minimizing the damage of a natural hazard. All such practices have a high risk content. An example of this is the decision by a farmer to introduce in to his fields a lucrative crop such as orange trees. Families in many less developed countries are dependent on their farm income for their livelihood. Converting land in cereals to land in orange trees requires capital (which may not be readily available), and a waiting period of a few years before the trees bear fruit. This family head is unable to take such a risk alone because the farming experiment may not work as well as anticipated, thus he is unable to

increase his family's income without external assistance.

Having said that, there is no evidence in this thesis to support this aspect of Stark and Lucas's theoretical assumption. Remittances appear to have been sought by families as an additional source of income. In other words, emigration does not appear to be motivated by the desire to boost agricultural income but rather as a diversification of income sources³³. In fact, idle land in Lala has tripled since the early 1970s, a period of civil unrest, heavy emigration and remittances. This period also witnessed very rapid inflation and urban to rural migration in many parts of the country. Both of these factors led to, according to Lebanese newspapers reports, a return to the land. This was not the case in Lala.

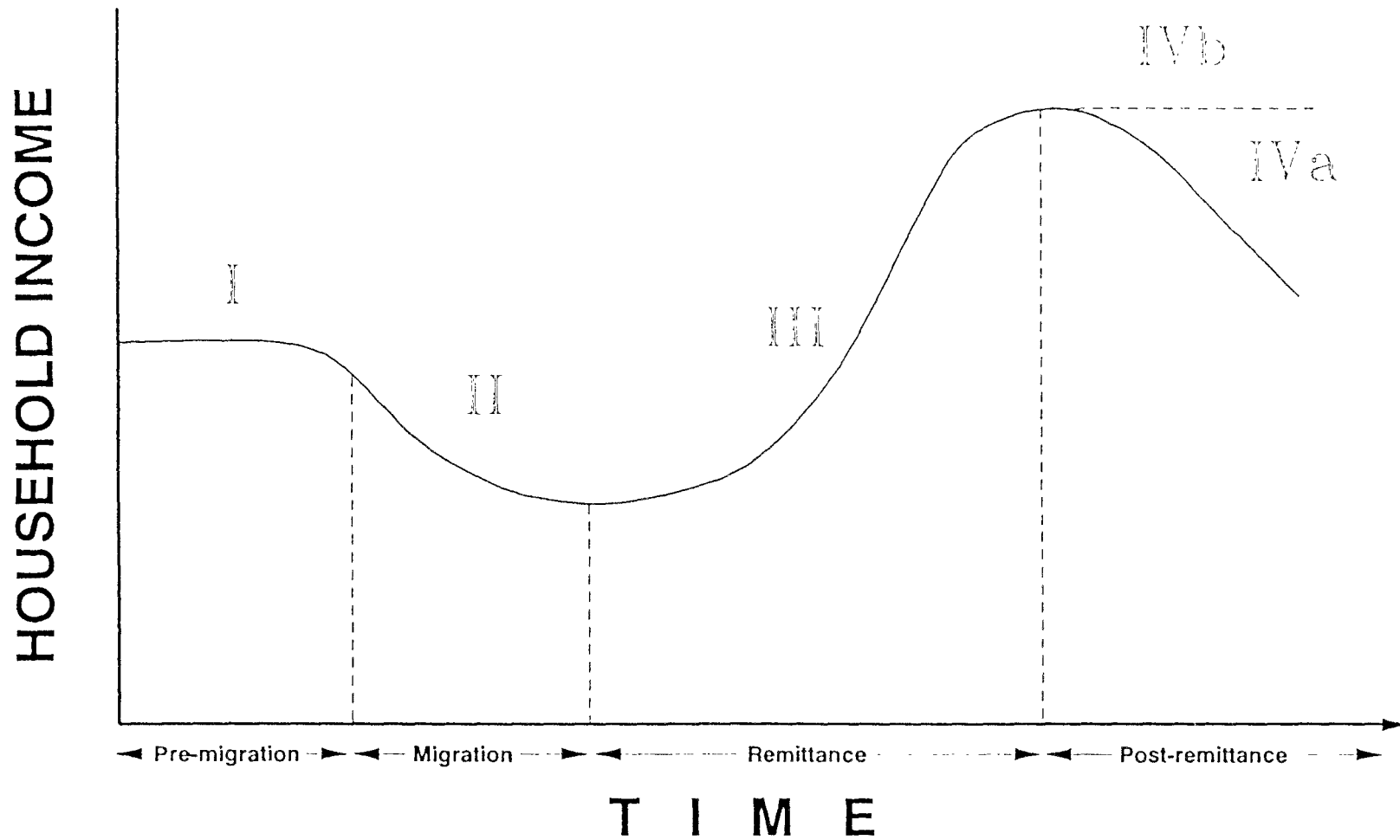
In stage II, the head of the family decides to invest in one³⁴ son's migration. It is too expensive for a family to insure the emigration of more than one son at the same time which explains why it is almost never done. Therefore, a family's income (or savings) declines rapidly due to transportation and other financial costs of migration, costs that are viewed by Stark and Lucas as an investment in an implicit insurance contract. A sending family's income remains low during the initial period of its sibling's migration who sometimes makes insurance claims during this period of economic instability.

³³ This does not exclude the fact that agricultural income in Lala was often meagre, insufficient and unreliable.

³⁴ This model applies to a family's first emigrant son

Figure 5.4

Effect Of Migration and Remittances on Household Income



Fluctuations in household income before and after remittances

The case of a contract migrant slightly alters the model because one is assured of a job beforehand, at a previously agreed upon salary, and often lodging. Therefore, one expects family income to decline for a short period followed by an instantaneous rise in income due to the promptness of remittances. This arrangement then circumvents (1) the experience of employment risk and uncertainty, (2) the need for financial outlays to get established in one's new place of residence, and (3) the fluctuation in the flow of remittances.

In stage III, family income begins to climb as the migrant gets established and begins to remit, thus abiding by the contract. Perhaps an insurance contract is not the best way to describe family relations because it stipulates that compensation be paid to the insured when *adverse* events befall him/her and not when he/she decides to simply improve his/her material well being. For example, remittances of Lala emigrants do not appear to be related to the civil war nor to the economic deterioration in the country as a whole. What is quite obvious is that remittances have increased the standard of living of all recipients. Household income climbs rapidly as a result of remittances which are viewed as a payment for the insuring family (which, in effect, becomes now insured by the migrant son) thus casting the migrant as seemingly fulfilling his share of the insurance contract.

In stage IVa, family income declines as a result of two factors: One, the now established migrant gets married, has children and begins to have more family responsibility abroad and less commitment to his parents in the source country. This has been explained in terms of "depressed altruism" and "reference group

substitution". Second, if the family does not invest remittances in productive income-generating endeavours (projects), then domestic family income is likely to decline.

Remittances, including returned migrants' often large sums of capital, appear to have little impact on domestic income in the village of Lala. Before domestic income declines, both factors are required because, abstractly speaking, a migrant can continue to remit at elevated levels indefinitely to keep family income high even if they do not use remittances productively. Remitting at "high" levels could sometimes be misleading. In Lebanon's case where the currency and the standard of living have declined over the last ten years, fewer dollars had greater purchasing power in 1989 than in 1970s. In other words, parents' cost to a migrant son does not necessarily increase with time.

STAGE IVb. Family income remains reasonably high (1) if one migrant sponsors his brother and (2) if remittances are invested in such a way to generate more income. This has happened in Lala where some remittances are being used to improve land quality by applying technology and fertilizers to it. Furthermore, some land has been converted from cereal use into orchards, a more lucrative agricultural activity. Having said that, there is a general decline in the agricultural sector where its contribution to household income is declining (see Figure 5.3) and people appear to be abandoning their agricultural land at a rapid pace (see Figure 5.2).

5.16 CONCLUSIONS AND FUTURE RESEARCH DIRECTIONS

Because Stark and Lucas's (1988) theoretical framework does not give a satisfactory theoretical answer to the question of *why Lala emigrants remit and those*

from Khirbit Kanafar do not, political and geo-sectarian supplementary explanations have been used. However, this question found a theoretical answer in a recent paper entitled "Relative Deprivation and International Migration". Its authors, Stark and Taylor (1989, 2), deal with international emigration and a migrant's commitment to residual family members from the perspective of relative deprivation, a concept they define as being "concerned with the feelings raised by intragroup inequalities". In their theoretical formulation which moulds the basis for the discussion below, Stark and Taylor (1989) assume a migrant in a land where incomes are vastly greater than those in the home village, and that this migrant's income is fully pooled with that of the residual family.

If the migrant becomes preoccupied comparing his income with those in the host country, the family's share of the migrant's income (remittances) will be reduced because of the migrant's feelings of enhanced deprivation. This process is referred to by Stark and Taylor (1989) as "reference group substitution". Philpot (1968, 474) concurs, suggesting that the erratic annual variation in the flow of remittances and their eventual decline could be analyzed in terms of a migrant's changing reference group from which he "derives his norms, attitudes, and values and the social objects these create."

Emigrating to a country or region that has a high degree of cultural and social similarity to that of the migrant can cause alienation from the source region and heighten feelings of relative deprivation thus causing a smooth reference-group substitution. This theoretical strand applies quite well to the situation in Khirbit

Kanafar where the village's Christian youth emigrate (1) to the West where they "fit in" better than those from Lala, or (2) emigrate more frequently to the Christian enclave in Lebanon, an area that is culturally similar to theirs. Khirbit Kanafar's emigrants smooth reference group substitution causes a feeling of enhanced deprivation and thus a weaker commitment to remittances.

On the other hand, emigrating to a region that is culturally distinct makes it less likely for the migrant to adopt a new reference-group hence keeping the original one relevant. This applies quite well to the Muslim migrants of Lala, the majority of whom choose destinations that are detached culturally from their own. Interestingly enough, Stark and Taylor (1989, 2) claim that in some cases, "the host community may consciously be selected to ensure estrangement, detachment and social distance". This practice guards against the risks of becoming assimilated in the host country thus dropping the original reference group (the family or village) and all the financial gains associated with that.

The fact that Lala migrants are far more concentrated than those from Khirbit Kanafar reflects a closer and a larger social network of Lala villagers abroad. This is indeed the case in Edmonton, Calgary and more so in Foz Do Iguacu, a city in Parana province in southern Brazil, cities that host the overwhelming majority of emigrants from Lala.

The interaction of migrants and their association with this network, community, or "emigrant village" acts as a "continuing general reminder about what the migrant should be doing for the people back home. ... defaulting migrants suffer

a loss of esteem among those who know that his family at home is having a difficult time" (Philpot 1968, 473). This is consistent with contract theory and its adherence mechanisms. Azariadis (1987, 736) asserts that the reputation of contractants keeps them from deviating from the terms of the contract, especially "if the time horizon is fairly long or the future is fairly important relative to the present".

The concept of relative deprivation has a definite positive effect on migration propensities which helps to explain the high emigration rate from Lala compared to that from Khirbit Kanafar. Some of Lala's emigrants have been returning and building very large and elaborate homes, thus revealing higher than average consumption levels. This spurs inter-family comparisons which can lead to a feeling of relative deprivation and a "need" to emigrate. Moreover, there are more landed households in Lala than in Khirbit Kanafar. This means that there is a greater ability to raise funds by selling or mortgaging land to cover the costs of international emigration.

On the other hand, in spite of the elimination of wage differentials between urban and rural areas in Lebanon, especially since the eruption of the civil war in 1975, rural to urban migration continued from Khirbit Kanafar. This agrees with the fundamental premise of Stark and his collaborators' (1991, 4), that wage differentials between regions do not constitute the strongest driving force in emigration research.

At this juncture, it is important to restate that the work of Stark and Lucas (1988) and Lucas and Stark (1985) are the only known published attempts that provide a theoretical framework for migrant remittances. While their two papers

constitute a significant contribution to and fill a major gap in the literature, many of their claims and assertions need to be rigorously tested and in different settings.

Stark and Lucas focus on migration in Less Developed Countries, that is internal rural to urban migration, or even migration between developing countries. Whereas there is evidence to suggest that their theory is also applicable to target (or limited contract) migrants (Grigg 1989), some serious questions about the theory's validity and applicability are raised when one considers "permanent" migration from Less Developed Countries to More Developed Countries.

One can safely conclude that Stark and Lucas's work is applicable to internal or international movement of labour³⁵, most of whom emigrate independent of their immediate family of procreation. It is obvious that a migrant labourer with wife and children left behind in the home village has a compelling reason to abide by the implicit contractual arrangement with his family of orientation or procreation and remit to them.

The question of remittances and migrant contract adherence becomes more complex when one considers permanent emigration to Western societies with developed social security programs. Additionally, a migrant's remittances are allegedly designed to affect the family head's subsequent choices by increasing the migrant's likelihood of inheriting a highly valued property or other family assets. While this may apply well to a situation of one migrant son, it may not apply to two

³⁵ This is captured by Stark's (1991) book entitled *The Migration of Labor*, with "labor" being a key word.

or more migrant sons who could compete for family favours.

The literature still does not address the question of comparing the value of inheritable property with the amount of money remitted. In other words, although it was not part of the survey, it was observed that some Lala emigrants remit at levels that exceed by far the value of their family's total inheritable assets which, despite remittances, are usually divided more or less equally among siblings. This question can be put differently and more broadly: are remittances *designed* to affect others (eg., parents') subsequent choices so as to increase the likelihood that a remitting migrant may be able to achieve a highly valued outcome which is currently under family control? If remittances are in fact designed to do that, are they successful? This research casts some doubt on that, and poses some questions that, when explored, could help to enhance, better specify and broaden existing theoretical frameworks.

This research supports Becker's (1976; 1981) assertion that altruism and not covetousness is a major integrating force within families. Indeed migrant children appear to consider the welfare of the family as a whole (family of orientation) for a long period of time, sometimes even after the death of its head(s).

C h a p t e r S i x

C O N C L U S I O N

6.1 SCOPE OF THESIS

This thesis tests Stark and Lucas's (1985) and Lucas and Stark's (1988) recent theory on migration and remittances by using data from Lala and Khirbit Kanafar, two villages in south east Lebanon. Data were collected using a questionnaire survey that was conducted in the two villages by this researcher in the summer of 1989, the most violent period in Lebanon's fifteen year civil war. This chapter briefly states some of the more interesting general observations, and then explicates the major findings in this thesis. Based on these observations and findings, the final section points the way to further research directions that will better illuminate and broaden existing theory.

6.2 GENERAL OBSERVATIONS

Some unique observations are immediately revealed from the data. Emigrants from Lala choose international non-Muslim destinations and those from Khirbit Kanafar largely choose internal Christian destinations. These trends are due to the dynamics of civil war, preferential treatment of Lebanese Christians over Muslims

in terms of local village development as well as the former's access to high ranking, mostly urban government positions. As for Lala, the lack of irrigation and rural opportunities, its residents' less favoured domestic position and widespread ownership of land¹ appear to have induced many of Lala's residents to emigrate internationally. In other words, the destination choice of Muslim and Christian migrants is best explained not by their religious orientation (as argued by Khuri 1967) but rather by economic factors.

The self-sustaining nature of migrant flows and their persistence even after all incentives (pull and push factors) disappear are due to the emergence of social norms which induce migration. These are believed to account "for the anomaly of persistent migrant flows from some communities and not from others in the same region, despite similar economic conditions" (Portes 1982, 126).

A number of factors affected the evolutionary emergence of migration norms in Lala and Khirbit Kanafar. The former village was quite impoverished with few urban employment opportunities, poor agricultural land, and unpredictable rain-fed agricultural crops. The process of emigration started with a trickle of people who felt the need to migrate internationally to improve their standard of living. A number of reasons turned the trickle into a flood: (1) socio-economic conditions and opportunities were static on the village and national levels, (2) information about international destinations became abundant, and (3) the standard of living (supported by remittances and migrants' investments) was going up rapidly. This made migration

¹ There are very few landless households in Lala. While many own fairly small pieces of land, they are usually large enough to sell or mortgage so to secure an airline ticket for a family member

a natural and an almost expected step for many youths who in congenial salutations (and partly in jest) now wish each other not marriage or good health but emigration. "Wealth abroad is home (or nation, *watan*), and poverty at home is alienation (or emigration: *ghurba*)"; and "changing the pastures fattens the oxen" are two frequently heard sayings in Lala. The psychic costs of detachment and migration are downplayed by: "cursed is the land that cannot sustain its people".

The standard of living in Lala, a village that has traditionally been dependent on remittances, began to improve in the 1970s and rather rapidly in the early 1980s. This was due to a wave of well-to-do returnees, a surge in emigration and an ensuing increase in remittances. The effect of remittances was being felt more in the 1980s, partly due to the fact that they are typically sent in American dollars. Their purchasing power in the 1980s was far higher than that in the late 1970s (Kubursi 1991) hence inducing a construction boom in Lala, especially after Israeli troops withdrew from the village in the summer of 1985.

The case of Khirbit Kanafar is somewhat different. It had been a well-to-do village because its residents had greater access to urban jobs, and more public services and infrastructure than Lala and its residents did. The agricultural sector in Khirbit Kanafar has been prosperous because it relies on lucrative orchard production which is supported by a spring and many water wells for extensive irrigation. Therefore, households were not dependent on nor in need of international migration and remittances.

But as the Lebanese pound began its rapid decline in the mid 1980s, the

purchasing power of urban salaries were dramatically reduced, and the war curtailed the access of Khirbit Kanafar's agricultural products to their traditional markets in Beirut and the Persian Gulf countries. Therefore, the deterioration of domestic wages and the value of the Lebanese pound, and Khirbit Kanafar's residents reduced contacts with migrant relatives due to the disruptions of the civil war, were all factors that made the village's families less able to finance their own international emigration.

Another observation is that while both villages have a high level of emigration, Lala emigrants remit heavily and those from Khirbit Kanafar do not remit at all². This is explained in terms of the geo-sectarian position of Khirbit Kanafar, the dynamics of the civil war and how it affects the village, family structure, and in terms of the relative deprivation approach. In other words, the absence of remittances to Khirbit Kanafar is due to the sense of insecurity the residual and migrant communities developed during the civil war, insecurity attributed to the location of this Christian village amongst a majority of Muslims.

The background chapter (Chapter 3) sets the scene for the research project by synthesizing the geo-sectarian structure of Lebanon and the politics of population census in the country. The analysis then shows how political sectarianism influences rural development, emigration and remittances, issues that have a differential effect on Lala and Khirbit Kanafar.

² Remittances to Khirbit Kanafar as defined in this thesis, are almost non-existent. However, this does not deny the reality that some sons living in Beirut do intermittently assist ("remit") their residual family members (typically the parents) by paying for their medicine or urban hospitalization.

The methodology chapter (Chapter 4) offers a number of guidelines for research in developing countries under conditions of war or political instability. Knowing the history of the current crisis and the language of the country or region to be researched is, under conditions of violence and/or instability, quite central to data collection and the safety and security of the researcher. Respondents may utter certain telling phrases that the interpreter may not deem necessary to translate or may not have time to do so. Knowing the language and political culture of the study area makes it possible for the researcher to intervene in opportune moments to calm the fears and suspicions of respondents because, under conditions of chaos and lawlessness, distrust may well lead to his/her physical abuse. Finally, a reliable contact person(s) who is politically neutral is an indispensable resource. In short, this chapter elucidates how some research methods and approaches which are typically applicable in and *recommended* for Third World settings under normal circumstances become vital and *obligatory* in war-time research.

6.3 THEORY, HYPOTHESES AND SOME FINDINGS

Stark and Lucas's theoretical papers on migration and remittances in Third World settings state that when a household is in need of adopting new agricultural techniques, it insures a sibling's emigration to an urban centre. Once a migrant is established, he or she will remit to (recompense) the residual family. This implicit unwritten contract between a migrant and the family is enforced because initially the migrant sibling needs the parents' support for transportation and other urban costs. Once established, a migrant sibling supposedly remits for a number of self-serving

reasons such as his need for the family's supervision of future rural investments, to maintain a good rural reputation which will facilitate a migrant's social re-integration into the village, and a migrant's desire to inherit his parents' wealth (land, cattle etc.). A migrant also remits to repay his parents for their insurance contract. Based on the theoretical framework, a number of hypotheses were advanced and tested.

In this case study, there is no evidence from either village to suggest that the emigration of a sibling is a strategy to improve a household's agricultural income (through the adoption of risky technological innovations). There is, however, some support for the fact that households, especially in Lala, use the migration strategy simply to reduce their dependence on risky (rain-fed) agricultural outputs, and to diversify their portfolio of human capital.

Exploratory hypothesis testing used correlation coefficients, t tests, and chi square tests. However, multiple regression analysis is best suited for the hypotheses at hand. Three regression models are developed, one for remittances to Lala, and the other two for each village's domestic income.

A finding from the remittance model appears to confirm the theoretical hypothesis that sons in their early years of migration can not and do not remit because they are typically looking for jobs (which they usually do not keep for long in this initial period), and are in need of cash to get established. There is solid confirmation of the hypothesis that once migrant sons are established (6 to 14 years after emigration), they remit generously to their families of orientation. Furthermore, remittances continue to flow to residual families even fifteen or more years after

siblings emigrate. This reflects not only the apparent permanency of migrant sons' commitment to the insurance contract they struck with their families, but also to a continued sense of altruism towards them. This is a good indication of the usefulness of the theory in predicting the flow of remittances to households with migrant sons, a source of income which is a primary source of post-migration rural development and change.

6.4 MIGRATION TYPES AND REMITTANCES

The type of migration observed in Lala and Khirbit Kanafar is permanent and long-term in nature. This resulted in the emigration of entire families and the establishment of small migrant communities in receiving countries, regions, or cities.

This type of migration is contrasted with a widely practised temporary labour migration which is usually tied to a fixed-term contract of employment. The terms of the contract typically prevent migrants from taking their families with them. An example of this is Arab and other Asian migrations to the oil-producing Persian Gulf states. Furthermore, some rural to urban or circular migrants can not afford to move with their families. The point is, it is natural³ to expect a temporary⁴ international migrant or an urban migrant not accompanied by his family of procreation to remit both to his family of procreation and orientation both of whom he needs to facilitate his village investment, and upon his return, to facilitate his reintegration into the village. In other words, a distinction (which is overlooked by Stark and Lucas) is

³ Natural because of "the moral imperatives of kinship and reciprocal obligations" (Frager 1988, 187).

⁴ Especially if one is on a limited-term contract.

being made here between temporary migrants and permanent ones, and each group's differential commitment to remittances.

Stark and Lucas's contribution is in shifting the focus of migration theory from individual independence to mutual interdependence of the migrant and his family through a contract that is dynamic and implicit. The terms of the contract are enforced for altruistic reasons (a family-specific asset) and for self-seeking motives emanating from both the migrant and the family. Having said that, there are a number of questions that remain to be answered through empirical tests before this novel theory takes root.

While migrants' remittances may be argued (as Stark and Lucas do) to be, at least partly, self-serving, this can not be so easily argued regarding permanent (family) migrants especially those to developed countries with advanced social security systems. Such migrations limit the need for a family insurance contract which, even if it existed, would be quite difficult to carry out because of the immense differential between the cost of urban living in developing countries as opposed to that in urban centres in most of Western countries. Moreover, an unemployed son in Paris or Toronto would be able to live off the unemployment insurance plan or the welfare system in these countries. Despite their emigration to developed and developing countries, Lala's permanent migrants keep on remitting even two decades after their emigration. In other words, altruism is probably a greater motivation for remittances than self interest and a familial (insurance) contract.

A second finding that supports the altruistic motivation of remitting sons has

to do with the rejection of the hypothesis that the larger the land area owned by a migrant son's family, the higher are his remittances to it (chapter five).

The third finding not only supports the earlier two but also detracts from the notion of family coalition formation (suggested by Stark and Lucas 1988). According to this notion, the family as a whole is conceived of as a coalition whose members are committed by choice to act together with respect to the rest of the world. "This not only facilitates protection from attempts to exploit individual weaknesses but also renders it possible to obtain more together than separately" (Stark 1991, 5). Upon migration, residual family members constitute a coalition (represented by the head of the household), who are in a strong bargaining position because they act together "against" the migrant son hence inducing him to remit.

This theoretical assertion may be valid if there is only one migrant son. Chain migration, a relatively common phenomenon in less developed countries (very prominent in Lala), is an issue that adds a twist to the theory. For coalition formation and bargaining to be comprehensive, a number of theoretical questions will have to be addressed. what happens when the first migrant son attracts the second (or even all his brothers) to emigrate? Does this weaken the bargaining position of the family? This is a key question because the first migrant son contributes, often significantly, to the education, transportation, and urban costs incurred abroad by the second migrant son (Diamantides and Constantinou 1989; Connell et.al 1975). Does this mean that the second migrant son is less committed to his family because, after all, the insurance contract is not with his family of

orientation but with his migrant brother. One would theoretically expect the level of remittances to fall after additional migrant sons join those already abroad. This, however, is shown in chapter five not to be the case in Lala. Migrant sons remit to their parents regardless of who insured them, and frequently remit well beyond the "insurance premium" thus casting doubt on the insurance, coalition formation and bargaining aspects of the theory. This in turn generates greater confidence in altruism within the family unit.

Data, however, appear to support the theory in one respect: Lala migrants remit to invest (often by building a home) in the village, an investment that is facilitated by their residual family members. While this can be argued as evidence of migrants' self-serving behaviour, it should be noted that the process of remitting and investing is mutually beneficial to the parents' and to their migrant sibling. On the one hand, a migrant is better off economically from his family's management of his investment, and socially from the new (preferably elaborate) home he had remitted to build in the village. On the other hand, a migrant's family benefits economically from the spill over effect from supervising and managing their son's home construction⁵, and their social status is also enhanced by displaying their son's (and by extension, their own) success.

The emerging sense of this thesis is that siblings' behaviour is not so much driven by self-seeking motives but more by what Lucas and Stark (1985) refer to as "tempered altruism." In fact, in their study they indicate that "Again, the Botswana

⁵ In Lala, the first son that plans to build in the village typically renovates his parents' house before building his.

data are highly suggestive⁶ (though not definitive), showing sons remitting more to households with more cattle. ... and [to inherit] they [sons] need to maintain favour with the head of the household" (Lucas and Stark 1985, 914). While there is agreement with Stark and Lucas that migration is mutually beneficial to the household and the migrant son, the lack of connection between land ownership and remittances casts doubt upon the self-seeking behaviour of migrant sons toward their families.

6.5 LALA AND KHIRBIT KANAFAR: TODAY AND TOMORROW

As for the two villages, the residents of Lala are rapidly abandoning agriculture and becoming more dependent on trade and other domestic investments, not to mention their greatest dependence which is remittances. The community is aging and migration norms (such as "migration is a path to manhood") are well established and associated with an overall lower emphasis on education compared to that in Khirbit Kanafar. However, this does not deny the fact that there have been some agricultural and educational improvements in Lala.

On the other hand, the population composition of Khirbit Kanafar is slightly younger, and its people appear not to have neglected agriculture at all because the area of idle land has remained almost constant in over a decade and agricultural income is still the pillar of the village economy. Moreover, the human capital base of Khirbit Kanafar is, due to historic and political reasons, quite strong. It is difficult

⁶ "Both overall and from urban areas only, sons do remit more to families with larger herds; the effect passing a 2 per cent and a 7 per cent significance test, respectively" (Lucas and Stark 1985, 911).

to forecast the future of each of the villages due to a number of positive and stabilizing socio-economic changes in this post-civil war period. For example, the standard of living in the villages' (and in the whole country) has been improving, albeit slightly, and the contentious National Pact of 1943 has been moderately modified (the new pact is known as the Taif Agreement) to more equitably represent the various sects.

It must, however, be said that prevailing economic conditions in Lala (especially as they pertain to its remittance-dependence) may not be permanent. The long tradition of emigration from Lebanon and its skyrocketing levels especially during the civil war, influences of other cultures due to the national tradition of migration, and because rural education is universally accessible, have all resulted in the breakdown (sometimes disappearance) of inherited social norms and controls. There is also greater ease of access to information about life in Canada, the United States of America, and Brazil, favourite destinations for Biqa'a migrants. The new generation of migrants will be better prepared to assimilate into life in the Western World hence a greater likelihood that the level and length of remittances will decline rapidly over time, only to stop at a later stage. What then are the prospects of a remittance-dependent village like Lala? As for Khirbit Kanafar, its residents appear to be in a somewhat better position to hold professional and public service jobs. Additionally, its agricultural sector, which is still intact, is recovering because of renewed access to urban markets in post civil war Lebanon. Farming can easily be vitalized with injections of capital and technology.

6.6 FUTURE RESEARCH

As mentioned above, there is a need to test the theory's application to households with more than one migrant son. There is also the need to compare the level of migrants' commitment to remittances to their families of procreation and those of orientation, and to differentiate between the level of commitment of temporary migrants and permanent ones.

This writer concurs with Elster (1989) in that self-interest does not provide the full explanation for adherence to social norms (such as migration and remittances). Although he could not provide any solutions, Elster (1989) suggests a closer look at the role of emotions, envy and honour, and the theory of conformism in maintaining norms, all of which are beyond the scope of this dissertation. Therefore, to really determine the greediness of migrant sons' and their assumed calculating nature, future studies need to evaluate for example, just how much would a migrant son save if he hires a contractor (not his family of orientation) to build his home? Can he afford socially to do that? Is the question one of economics or of social norms (socialization) and pressures (expectation)? The cultural explanation is emphasized by a number of studies (for example, Philpot 1968 and 1970; Khuri 1967; and Trager 1988) who assert that mutual and reciprocal obligations between a migrant and his family of orientation is of primary importance. Family obligations are expected and internalized, and those who do not fulfil their obligations are

ostracized⁷ by the migrant community.

On a different level, to determine if a migrant is greedy and displays a self-serving behaviour, it is essential to estimate the total amount remitted versus the cash value of the family's wealth he presumably covets to inherit (and the migrant son's expected share of that wealth under normal circumstances). Moreover, do remittances actually influence the distribution of bequests? The assumed self-serving behaviour of migrant sons can also be determined by monitoring, say, any sudden increase in remittances (and communications) shortly prior to his return, and if the bulk of a migrant's village investments are managed by the family of orientation before their return. A longitudinal survey is necessary to determine whether in reality those who remitted more were bigger beneficiaries than those who did not. Based on informal conversations with heads of households in and returnees to Lala, it *appears* that migrant sons who remit most are at best only slightly advantaged over their brothers and sisters when it comes to bequests. It should be kept in mind that permanent emigrants to Canada, United States of America, or to Brazil are, unlike temporary or target migrations, less likely to return and sometimes only expect a token bequest more for its sentimental rather than economic value (e.g., to build a house in their "place of birth" and "parents' homeland").

It is essential to determine just how much each child sends because this will allow us to know if the period of time abroad loosens or strengthens a migrant's commitment to the familial insurance contract, and if the second migrant son remits

⁷ The threat of ostracism is useful in sustaining and enforcing certain social norms which if violated, sanctions will be triggered (Elster 1989)

more or less than the first. Along the same lines, there should be a correlation between the timing and value of remittances, with the number and age of children of sender, and if the sender lives in a community where there are many of his fellow village or country folk. These questions will help to assess the effects of the number of children on the family of orientation and social community pressure on the flow of siblings' remittances.

The long absence of a theory of migration and remittances has created an enormous deficiency of theoretically based research in this area, hence much remains to be done. However, the biggest hinderance to swift advances in this field is the lack of data, especially disaggregated micro-level data. The overall effects of emigration and remittances have been positive because they insured the villages against the hazards of civil war and economic collapse, improved the standard of living, and reduced the level of inter- and intra-village inequality (Amery 1992).

APPENDIX (A)

Table 1A Correlation Matrix of Remittances to Lala

	RMT	HHHAGE	IDLND	CEREAL	TREEL	LBNY	NTRIP
RMT	1.00						
HHHAGE	-0.04	1.00					
IDLND	0.19	0.07	1.00				
CEREAL	-0.17	0.03	0.08	1.00			
TREEL	0.23	0.8	0.48	0.29	1.00		
LBNY	-0.07	-0.123	0.05	0.03	0.16	1.00	
NTRIP	0.30	0.04	0.02	-0.22	-0.15	-0.05	1.00
MSYRED	0.3	0.23	0.05	0.02	0.08	-0.01	0.12
NONMSD	0.04	-0.26	0.03	0.08	0.17	0.31	-0.13
SAWY05	-0.03	-0.03	0.00	0.01	0.03	-0.01	-0.23
SAWY614	0.39	0.18	0.09	0.07	0.14	-0.03	0.01
SAWY15+	0.33	0.22	0.05	-0.18	-0.00	-0.03	0.44

Table 1A. Continued .

	MSYRED	NONMSD	SAWY05	SAWY614	SAWY15+
MSYRED	1.00				
NONMSD	0.04	1.00			
SAWY05	0.33	0.16	1.00		
SAWY614	0.33	-0.05	0.05	1.00	
SAWY15+	0.10	-0.15	-0.35	0.00	1.00

Table 1B

Correlation Matrix For Domestic Income in Lala

	LBNY	HHHAGE	IDLND	CEREAL	TREE	HHSIZE	TLRTMIG	RMTSTRBLD
LBNY	1.00							
HHHAGE	-0.06	1.00						
IDLND	0.1	0.17	1.00					
CEREAL	0.03	0.04	0.22	1.00				
TREE	0.54	0.18	0.45	0.37	1.00			
HHSIZE	0.30	-0.42	0.28	0.06	0.18	1.00		
TLRTMIG	-0.17	-0.38	-0.19	-0.27	-0.19	-0.033	1.0	
RMTSTRBLD	0.08	-0.03	-0.04	-0.09	0.03	0.04	0.12	1.00

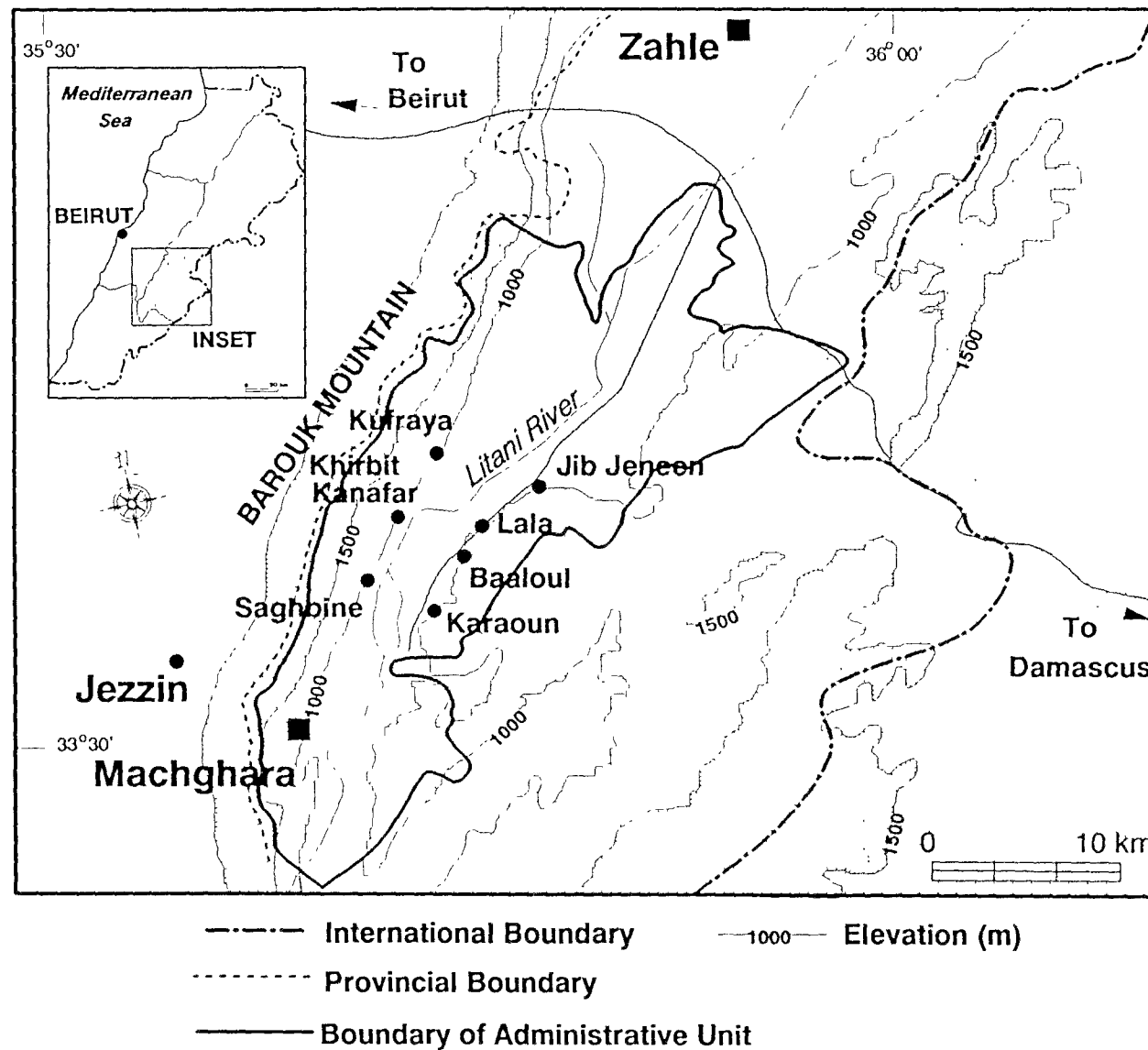
Table 1B continued

	RMTSTRBLD	IMPRVLND	HHHHED
LBNY	0.08	-0.13	0.14
HHHAGE	-0.03	-0.06	-0.21
IDLND	-0.04	-0.09	0.7
CEREAL	-0.09	0.03	0.19
TREE	0.03	0.03	0.27
HHSIZE	0.04	-0.18	0.16
TLRTMIG	0.11	0.31	0.03
RMTSTRBLD	1.0	0.02	0.05
IMPRVLND		1.0	0.00
HHHHED			1.0

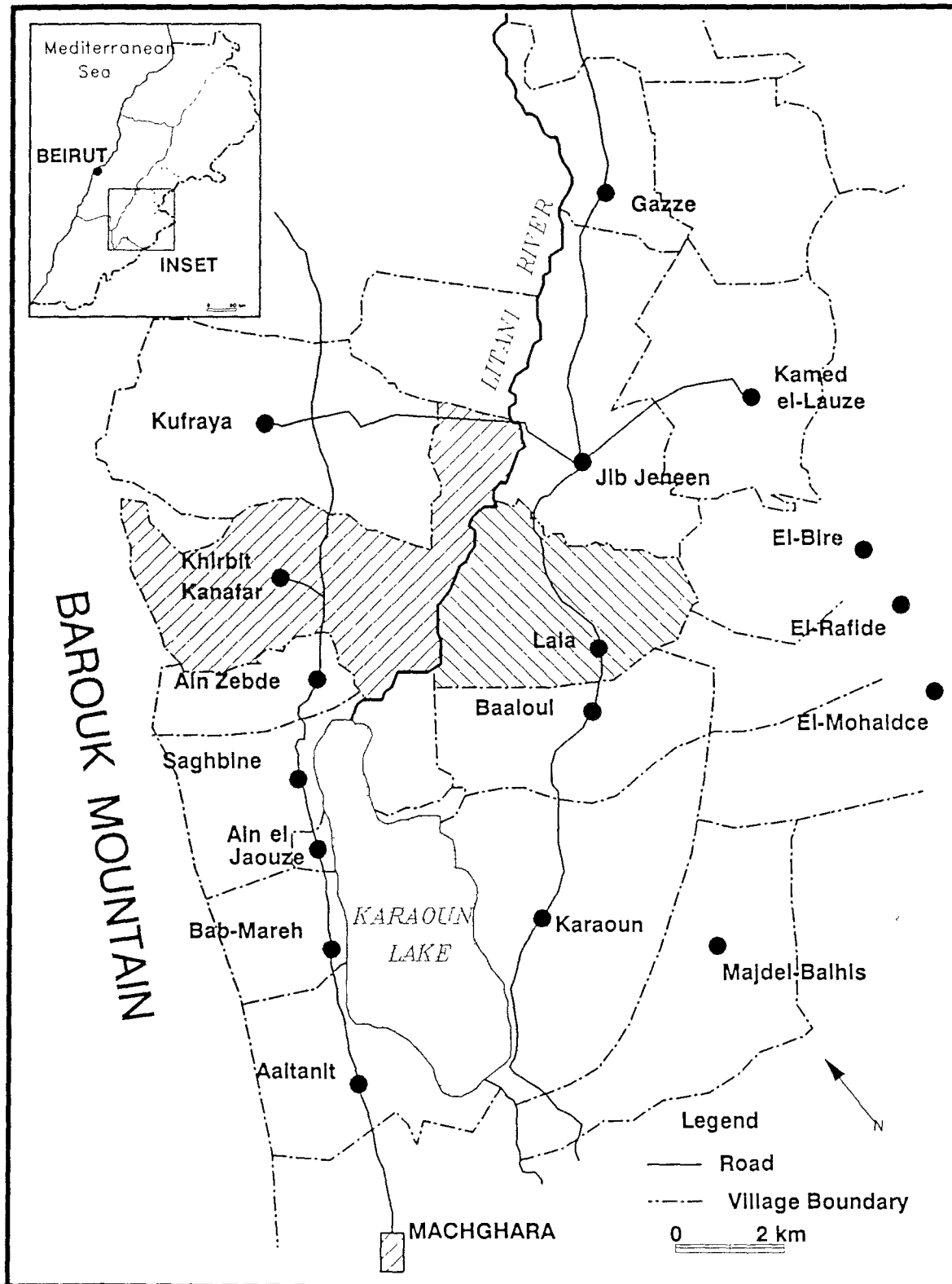
Table 1C

Correlation Matrix For Khirbit Kanafar's Domestic Income

	LBNY	HHHAGE	IDLND	HHHED	CEREAL	TREE	HHISIZE
LBNY	1.00						
HHHAGE	-.28	1.00					
IDLND	-.04	.14	1.00				
HHHED	.19	-.46	-.09	1.00			
CEREAL	.43	-.2	-.1	-.09	1.00		
TREE	.42	.11	.06	.08	-.02	1.00	
HHISIZE	.08	-.47	.07	.11	.23	-.11	1.00



Appendix B1
Map of the Physical Geography of the Western Biq'a'a



Appendix B2

Map of the Selected Villages in the Western Biqa'a

B i b l i o g r a p h y

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