

THEORETICAL FRAMEWORK FOR THE STUDY OF THE TWO- WAY RELATIONSHIP BETWEEN MIGRATION AND SUBJECTIVE WELL-BEING¹

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ABSTRACT

This paper provides an overview of the relevant theoretical frameworks of well-being and migration and the links between the two concepts. The article is part of the theoretical preparatory work for the MIGWELL project. We argue that subjective well-being should be a key concept in migration research, because increasing it at the individual level is a universal human desire. From this perspective, migration – if it is truly voluntary – may be a tool to reach the desired outcome of increasing well-being. In general, micro-level approaches are more suitable for linking subjective well-being and migration. In particular, the “new

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economics and sociology of migration”, the “network theory” and the “capabilities approach” offer the implicit or explicit possibility to do so. Regarding well-being, we apply a hybrid approach, inspired by both the OECD and the WeD concepts. Finally, in this paper we propose a research design that may be suitable (with some limitations) to capture the two-way relationship between the two concepts: the impact of subjective well-being on migration intention and the effect of migration on subjective well-being.

Keywords: migration, well-being, satisfaction, happiness, theory

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INTRODUCTION

The motivation behind migration has been extensively explored in extant literature. A multitude of theories, conceptual frameworks and empirical approaches have been developed to explain the initiation and the perpetuation of migration. With the increasing complexity of international migration processes, migration research has also begun to take a greater interest in how diverse migration situations influence individual well-being. This concept paper presents and critically analyses the relevant theoretical frameworks of well-being and migration. It provides an overview of the research state, highlighting both strengths and weaknesses of these concepts. The paper also includes critical reflections.

This paper is part of the theoretical preparatory work for the MIGWELL project. We present a research design from the perspective of this specific project, which focuses on the Hungary–Austria migration nexus. The proposed design could be, however, successfully applied in other empirical studies as well. This approach is innovative because it links the concepts of well-being and migration, and interprets their two-way relationship within one research framework.

CONCEPTUAL FRAMEWORKS OF WELL-BEING

Since the 1950s, there has been a growing concern that the dominant economic frameworks are inadequate in addressing the challenges of our rapidly changing society. The concept of *well-being* has gained prominence due to the realization that a narrow focus on economic factors and some widely used indicators such as GDP does not accurately reflect people's welfare (Stiglitz et al., 2009; Organisation for Economic Co-operation and Development [OECD], 2011; Adler and Seligman, 2016; Coulthard et al., 2018).

The term 'well-being' is not new at all. It has been used loosely and abstractly for centuries (Milner-Gulland et al., 2014). The roots of the concept date back to Aristotle and were later revived particularly by Bentham (Aristotle, 2009; Bentham, 2013). During the last decades of the 20th century, there was a significant increase in interest in well-being research (see Easterlin, 1974; Diener, 1984; Kahneman, 1999). This topic gained even more attention following the final report of the Commission on the Measurement of Economic Performance and Social Progress, chaired by Amartya Sen, Joseph Stiglitz, and Jean-Paul Fitoussi (Stiglitz et al., 2009). In the wake of the global financial crisis, the world-famous economists emphasised the urgent need for policymakers and scientists to shift their focus from production and growth to sustainable human well-being. However, the term 'well-being' can be interpreted in various ways without proper conceptualisation, leading to potential confusion and misunderstandings.

The Stiglitz report stimulated global initiatives to develop a comprehensive framework for understanding well-being (e.g. Allin and Hand, 2014; McGregor and Sumner, 2010; OECD, 2011; UK ONS, 2011). As a result, an increasing number of statistical agencies have launched targeted surveys to measure it. Although there is no universally accepted theoretical framework, it is widely accepted that well-being should be understood as multidimensional. In addition to objective living conditions, it is important to consider how people feel about their lives – i.e., their subjective well-being (SWB).

OBJECTIVE INDICATORS APPROACH

Attempts to quantify well-being initially relied on easily measurable objective components that reflected people's life circumstances on a national level. The idea of compressing information on economic and social *attributes into one composite index* dates back to the mid-20th century (see e.g. Bauer, 1966).

Examples include popular metrics such as the Physical Quality of Life Index (Morris, 1979), the Human Development Index, HDI (UNDP, 1990), the Human Poverty Index (UNDP, 1997), the Multi-Dimensional Poverty Index, MPI (Alkire and Foster, 2011) or the Index of Sustainable Economic Welfare, ISEW (Daly and Cobb, 1989). Most of these indices have been suggested to replace or supplement GDP as the key indicator for economic policy worldwide. Aggregating various objective indicators across different domains is a shared characteristic, such as in the case of HDI, which includes gross national income per capita, life expectancy at birth, mean years of schooling and expected years of schooling. While these are not explicitly well-being measures, they do address a limited range of factors that might be relevant to well-being.

The indicators of development or welfare have evolved from a narrow focus on objective measures to more complex and multidimensional indicators over the last decades. This expansion includes subjective components, as reviewed by King et al. (2016). Indices such as the Happy Planet Index, the National Well-being Index, and the Better Life Index represent transitions towards integrated well-being frameworks (see later) because they already contain life satisfaction or happiness data as subjective elements. However, the authors place a strong emphasis on quantitatively measurable, objective dimensions. Their aim is to provide only one or a few comparable indices on a national level.

In 2006, the New Economics Foundation introduced the *Happy Planet Index* (HPI) by aggregating life expectancy at birth, ecological footprint per capita, and subjective life satisfaction (see e.g. Marks et al., 2006). Conceptually, it approximates multiplying life satisfaction and life expectancy and dividing that by the ecological footprint. The index is weighted to give higher scores to nations with lower ecological footprints. In the same year, Vemuri and Constanza (2006) published the *National Well-being Index* (NWI). One of the best-known indicators is the *Better Life Index* (BLI), which relies on best practices for creating composite indicators (OECD, 2008).

Although well-designed composite indices are useful for distilling complex topics into easy-to-communicate numerical values, they have limitations and they “cannot be used for policy evaluation” per se (OECD, 2011: 26).

THE EVOLUTION OF THE CONCEPT OF SUBJECTIVE WELL-BEING

Beside the relatively easily measurable objective components of well-being, research on its subjective factors has also gained increasing attention over the past few decades (Diener, 1984, 1994; Easterlin et al., 2010; Kahneman and Krueger, 2006, etc.). *Subjective well-being* (SWB) generally captures people's thoughts and feelings about the quality of their life circumstances. It is usually measured through psychological responses, such as life satisfaction, autonomy, social connectedness, or personal security (Diener, 2012; Ryff and Keyes, 1995).

Although notions such as “happiness” have long been considered important aspects of quality of life in common parlance, they were deemed beyond the scope of statistical measurement until recently. Over the last three decades, a growing body of evidence has shown that the slippery term of subjective well-being can be operationalized and measured using both quantitative and qualitative methods (e.g. Camfield et al., 2009; Diener and Suh, 1997). International surveys and scientific investigations based on them are able to support policy-making by providing subjective evaluations of well-being, in addition to objective information about living conditions and resources.

The evolution of the concept has entailed numerous interpretations since the 1970s, when the first attempts were made to associate happiness and satisfaction with welfare (Easterlin, 1974; Scitovsky, 1976). Since then, approaches and methods aiming at understanding what people believe they need to achieve a good quality of life, and measuring their degree of satisfaction with the extent to which these needs are met, have become more sophisticated (King et al., 2016; McGregor et al., 2009; Veenhoven, 2008, etc.). While the terms “utility”, “pleasure”, “happiness” and “subjective well-being” were used more or less interchangeably in the past,² there is now a general consensus that subjective well-being should be “an umbrella term for the different valuations people make regarding their lives, the events happening to them, their bodies and minds, and the circumstances in which they live” (Diener, 2006). The following paragraphs summarise the most important approaches that focus on the cognitive, affective, or psychological aspects of subjective well-being.

² On their differences see Camfield and Skevington, 2008 or Selezneva, 2011.

The hedonic and eudaimonic approaches

The *hedonic* interpretation of subjective well-being relies on the utilitarian concept of pleasure and it is frequently operationalised in terms of life satisfaction and affects. The *life satisfaction* interpretation is both cognitive and evaluative and requires individuals to make evaluative statements about different areas of life and about life as a whole (Boyce et al., 2010; Christoph, 2010; Dumludag, 2014, etc.). Satisfaction is usually understood as a lasting state of well-being. *Happiness* is closer to the terms ‘affect’ or ‘affective well-being’ used in psychology literature (Di Fabio and Palazzeschi, 2015; Graham, 2009; Layard, 2005, etc.).

Positive and negative emotions – the components of *affective* well-being – reflect a more corporeal and transitory state of well-being. These are typically surveyed with reference to a shorter timeframe, for instance the most recent four weeks. Nevertheless, it is important to underline that satisfaction and emotions can be separated in theory, but they might be interrelated in practice, since people’s emotional experiences influence their evaluation of life satisfaction (Dragolov et al., 2018). As Kahneman (1999) summarized: in a hedonic approach, subjective well-being can be seen as an index of psychological well-being, and happiness refers to the accumulated moments of experiencing pleasure and the absence of pain (Diener et. al, 1999; Selezneva, 2016).

Eudaimonic well-being is expounded in the tradition of humanistic psychology. Unlike emotions or satisfaction, this component of SWB does not correspond to a single internal state; rather, it utilizes individuals’ self-reports on a broader suite of elements that are necessary for people to flourish and to fulfil their potential. Eudaimonic well-being reflects the feeling of meaning and purpose in life, accomplishment, as well as the aspects of belonging, self-esteem, and self-actualisation (Clark et al., 2008; Di Fabio and Palazzeschi, 2015; Vittersø, 2016).

As will be discussed in more detail later, in practice these are not mutually exclusive but rather complementary measurement concepts.

Capability approach

A further concept used in subjective well-being research is the capability approach, which challenges utilitarian happiness and instead brings individual-specific capabilities into focus. This approach emphasises the importance of a person’s autonomy in achieving valued “*functionings*”. According to Sen

(1985), “the standard of living is really a matter of functionings and capabilities and not a matter directly of opulence, commodities, or utilities”. To put it simply: it is not the things that people *have* that make them feel well, but what they are able to *do* and *achieve* with those things.

One of the chief strengths of Sen’s framework is its flexibility and internal pluralism, which allows researchers to develop and apply it in a multitude of ways (Alkire, 2002: 8–11, 28–30). Sen refrains from endorsing a fixed or definitive list of capabilities as objectively correct due to practical and strategic reasons (Clark, 2002: 54). Instead, he argues that the selection and weighting of capabilities depend on personal value judgements (which are partly influenced by the nature and purpose of the evaluative exercise). Sen also indicates that his approach can be used to assess individual advantage in a range of different spaces.

The criticism casts doubt on the usefulness of the approach for making interpersonal comparisons of well-being in the presence of potential disagreements about the valuation of capabilities, including the relative weights to be assigned to these capabilities (e.g. Beitz, 1986). Sen was optimistic about achieving agreement about evaluations: he suggested that the intersections of different people’s rankings are typically quite large (Sen, 1985: 53–56). He has also proposed a range of methods, including the intersection approach for extending incomplete orderings (Saith, 2001). Finally, the informational requirements of Sen’s approach can be extremely high (see Alkire, 2002: 181; Sen, 1994). Evaluating social states typically depends on acquiring data on multiple functionings. In some cases, however, the relevant social indicators are not available. The transition from functioning to capability complicates the exercise drastically, as additional information is required on counterfactual choices (which cannot be observed) as well as actual choices (Clark, 2005). Despite these operational difficulties, numerous pioneering attempts have been made to measure well-being in both the functioning and capability domains (e.g. Clark, 2002).

The OECD guidelines on measuring subjective well-being

While subjective well-being has been extensively examined in the academic literature for decades, the lack of a consistent set of questions has hampered the international comparability of data. Bridging this gap was the main motivation for the OECD (2013a) to elaborate the *Guidelines on Measuring Subjective Well-being*. These Guidelines offer an integrated approach and propose a

solution for statistical agencies to follow a standardised survey structure and methodology. The primary objective of the document is to provide guidance on best practice and to “assist data producers in meeting the needs of users by bringing together what is currently known on how to produce high quality, comparable measures of subjective well-being” (OECD, 2013a: 9).

According to the OECD definition, subjective well-being encompasses the three elements mentioned in the previous section: life satisfaction (a reflective assessment of a person’s life or a specific aspect thereof), affect (feelings or emotional states, typically measured with reference to a particular point in time) and eudaimonia (a sense of meaning and purpose in life, or good psychological functioning) (OECD, 2013a: 10; *Table 1*).

Table 1: A simple model of SWB measurement and related question examples

Measurement concept	Sub-components	Recommended question modules	Question examples
Life satisfaction	Overall life satisfaction, satisfaction with income, accommodation, health status, etc.	1 Life satisfaction	Overall, how satisfied are you with life as a whole these days? (0–10)
		4 Domain satisfaction	How satisfied are you with your income / accommodation / working conditions / health / personal relationships etc.?
Affect	Happiness, anger, worry, etc.	2 Affect	Overall, how often did you feel happy / calm / worried / tired / angry / depressed / sad / stressed etc. these days?
Eudaimonic well-being	Meaning and purpose, autonomy, competence	3 Eudaimonia	To what extent do you feel: the things you do in your life are worthwhile / you are free to decide how to live your life / that you are optimistic about your future? etc.

Note: The list of sub-components and questions is illustrative rather than exhaustive.

Source: OECD Guidelines (2013a: 33, 253–262), authors’ compilation.

INTEGRATED, MULTIDIMENSIONAL WELL-BEING FRAMEWORKS

The first multidimensional well-being concepts emerged in the 1970s, with the works of Allardt (1976), Andrews and Withey (1976), and Campbell et al. (1976). The upsurge of initiatives around an integrated, multidimensional framework started in the 1990s, although it was remarkably galvanised by the final report

of the Commission on the Measurement of Economic Performance and Social Progress (Stiglitz et al., 2009). Nowadays, there is a general consensus that an appropriate well-being framework should be multidimensional, integrated, well-structured, and assessed via a mixed-methods approach (McGregor et al., 2015).

The general OECD framework of well-being

In 2011, the OECD launched the so-called Better Life Initiative to explore what drives human well-being in general and to identify strategies to achieve greater progress for all in OECD countries. Among the various projects within this initiative, the elaboration of the Better Life Index and the comprehensive biennial *“How’s life” reports* should be highlighted (OECD, 2011, 2013b, 2015, 2017).

In this general concept, well-being is measured in terms of outcomes achieved in two broad dimensions: “Material living conditions” and “Quality of life”. Although the second pillar includes several human development indicators, the approach to subjective well-being remains at a very broad-brushed level. While most of the selected indicators came from official, internationally comparable data (e.g. employment rate, number of rooms per person in a dwelling), the report used two SWB variables from the World Gallup Poll survey: one question about life-satisfaction and one about affect balance.

This solution reflects both the purpose of the framework and the level at which it operates. The OECD framework was principally designed to measure aggregated well-being scores at the level of countries and global macro-regions by using existing data from national statistical systems and international agencies (McGregor et al., 2015).

The WeD framework

The objective of the MIGWELL project is to gain a better understanding of the drivers of well-being at the individual level. Designed with broadly similar foundations but rather for use at the micro level, the WeD framework takes account of the dynamic interplay of three main well-being dimensions (Gough and McGregor, 2007).³

³ The concept was developed by the ESRC ‘Well-being in Developing Countries’ research group at the University of Bath.

In the WeD framework, *material* well-being encompasses the objective circumstances of life, including resources such as income or employment. However, since people's goals and actions are always shaped by the social contexts in which they are embedded, well-being has a *relational* dimension as well. This dimension refers to the social relationships that people must be able to enter into in order to meet human needs. It "links the framework from the individual to the social" (Britton and Coulthard, 2013: 32) by encapsulating essential, though less tangible, aspects of well-being, such as love, friendships, family ties, relationships with the community and the wider society, and the construction of identity, which is a situational and relational process (Tajfel and Turner, 1986). The third – *subjective* – dimension takes account of "what it is that people themselves regard as important for their quality of life and their assessment of their level of subjective satisfaction in their achievement" (McGregor and Pouw, 2017: 1135).

In contrast to the OECD How's Life framework and international surveys such as EU-SILC, European Quality of Life Survey or European Social Survey, which tend to focus on individual factors of subjective well-being and include very few questions about social relationships, the WeD approach places special emphasis on locally relevant social aspects. This is crucial for MIGWELL because migration decisions and post-move SWB evaluations are socially embedded.

RELEVANT MIGRATION THEORIES

Migration is driven by various complex factors, including the desire to earn a better living, find a safer and more agreeable environment to live in, improve one's career prospects, search for new experiences, or join one's family or ethnic network abroad. These factors have been extensively explored in extant literature. However, there is no general theory that explains the initiation and perpetuation of migration. Instead, as research on migration is intrinsically interdisciplinary and because each discipline considers different aspects of population mobility, a multitude of theories, explanatory models, and empirical approaches have emerged (e.g. Arango, 2000; Bretell and Hollifield, 2014). These concepts help us to understand why some people migrate from a certain country or region and others do not. Furthermore, they explain the individual and external factors that affect such decisions to move or stay, as well as the circumstances under which migration can be associated with benefits – or costs – for the migrants and their places of origin and destination. Each of these

models emphasises different aspects of the relationship. Therefore, determining which of the explanations are useful in the concrete research context “is an empirical and not only a logical task” (Massey et al., 1993: 455).

According to De Haas (2021), migration theories can be ordered into three main groups. The push–pull approach, the neoclassical models, and the migrant network theory, for instance, are situated within the *functionalist* paradigm, according to which migration is essentially an optimization strategy of individuals or families making cost–benefit calculations. The world systems theory and the dual labour-market theory, among others, belong to the *historical-structural paradigm*, which interprets migration “as being shaped by structural economic and power inequalities, both within and between societies, as well as the ways in which migration plays a key role in reproducing and reinforcing such inequalities” (De Haas, 2021: 4). More recent theories, such as transnational (Vertovec, 2009), diaspora (Safran, 1991), and creolisation (Cohen, 2007) theories – which focus on migrants’ everyday experiences, perceptions, and identity – can all be situated within the *symbolic interactionist* perspective.

However, there are many other ways in which migration theories can be classified. One may ask, for instance, whether they focus on the initiation or the perpetuation of migration. Alternatively, one may consider the main discipline that they have originated from: sociology, economy, geography or demography (Castles et al., 2014; Faist, 2000; Massey et al., 1993). In this paper, we adopt a classification based on the level of analysis at which these migration theories operate. This entails the distinction between micro-, meso- and macro-level approaches. We will then analyse how they can be related to the problem of migration and well-being (Table 2).

Table 2: Classification of certain migration theories according to their level of focus

Micro	Meso	Macro
– Push-and-pull model	– New economics and sociology of labour migration	– Push-and-pull model
– Micro neo-classical theory	– Network theory	– Macro neo-classical theory
– Behavioural models	– Cumulative causation theory	– Dual labour market theory
– New economics and sociology of labour migration	– Institutional theory	– World systems theory
		– Migration cycles

Note: Some theories are listed twice because they cannot be clearly classified.

Sources: Massey et al. (1993), Wickramasinghe and Wimalaratana (2016).

In the following subsections, we will provide an overview of the migration theories relevant to the MIGWELL project. For each theory, we indicate whether the concept of well-being appears either implicitly or explicitly, and if so, how it relates to the given migration theory. Generally speaking, migration theories that focus on the micro-level are suitable for linking subjective well-being and migration. In particular, the “new economics and sociology of migration”, the “network theory” and the “capabilities approach” offer the implicit or explicit possibility to do so.

PUSH-AND-PULL MODEL

Ernest Ravenstein’s study, entitled *The Laws of Migration* (1889), is widely considered the earliest migration theory. His empirical observations from England and Wales provided evidence of a spatial gravity model: people tend to move from low-income to high-income areas, while the volume of migration decreases as physical distance increases. Ravenstein stated, among others, that economic factors are the primary drivers of migration, that population movements are bilateral (migration flows produce compensating counter-flows, although not in the same volume), that migration occurs mostly in stages instead of in one long haul, and that long-distance migrants tend to choose the industrial, commercial centres of a country as their destinations.

In 1966, Everett Lee reformulated Ravenstein’s theory. In this landmark study, he pointed out that migration is driven by so-called *push* and *pull factors*. In general, unfavourable external conditions (e.g., low wages or high unemployment) motivate people to leave a place, while the target location is determined by favourable economic conditions, the pull factors. However, the decision to migrate is also affected by “intervening obstacles” (such as distance, physical barriers, immigration laws, etc.), as well as personal factors. Lee emphasised that the migration process is selective, because people’s ability to overcome intervening obstacles depends on their personal characteristics, e.g., age, gender, social class, and education level. In the push-and-pull “parlance”, migrants responding to positive factors at the destination are positively selected, while migrants responding to negative factors in the region of origin are negatively selected. Therefore, a migrant population is rarely representative of its country of origin. The characteristics of migrants tend to be intermediaries between the characteristics of populations at the places of origin and the place of destination.

The elements of subjective well-being in the decision-making processes play little or no role in the push-and-pull model.

NEOCLASSICAL MODELS

The neoclassical models are among the best-known theories of international migration. The macro and micro variations of this theory are not fully independent from the push-and-pull model, but they provide different ways of breaking down the complex subject of migration into analytically logical units. They are also related in that they pay little attention to the issue of well-being beyond the income factors.

According to the *neoclassical macro model*, the direction and volume of migration is principally determined by wage inequalities and labour market imbalances (e.g. Harris and Todaro, 1970; Todaro, 1976; Zimmermann, 1994). Although Harris and Todaro initially developed this model for explaining internal rural-urban migration, it can also be applied to international migration. In some countries, labour is scarce in relation to capital, with a high relative wage level, while in other countries the opposite obtains for the relative price of capital. The assumption is that migration results from the uneven geographical distribution of labour and capital, and that the differences in wages cause people from low-wage countries to move to high-wage countries. As a result, the supply of labour decreases and wages rise in the capital-poor countries, while the supply of labour increases and wages fall in the capital-rich countries. At the same time, capital moves in the opposite direction (Massey et al. 1993). In the long run, this process would theoretically result in wage convergence between sending and receiving areas, thereby eliminating the main motivation for migration. Therefore, the literature often describes this model as a “neo-classical equilibrium perspective” (De Haas, 2008: 4).

The *neoclassical micro model* is based on a similar conceptual pillar (differences in earnings and employment are responsible for international migration) but it focuses on individual choices, which might be of interest for linking well-being and migration (Sjaastad, 1962; Todaro, 1969, 1976; Todaro and Maruszko, 1987). According to this approach, people are rational actors who move if a cost-benefit calculation leads them to expect a positive net return from movement. This decision-making process can be analytically summarized by a mathematical equation. People estimate the difference between their expected incomes in their countries of origin and destination and place it in relation to migration costs. If the expected gains in income or well-being are

greater than the costs, and if they still have enough years before retirement, the rational choice is migration (Borjas, 1990; Fassmann et al., 2018). To summarize, international migration flows in the geographic space are the cumulative results of individuals' rational decisions based on calculations of expected benefits and costs.

The decision-making process is often interpreted within the *human capital* framework (Sjaastad, 1962; Poot et al., 2009), which can explain the selectivity of migration too. Given the diversity of individuals in terms of age, gender, education, experience, language skills, etc., there are also differences in the extent to which they might gain from migrating, "that is, they can expect diverging returns on their migration investment" (De Haas, 2008: 6). This implies that the probability of migration differs between individuals and certain social groups, depending on their human capital characteristics.

The *life course approach* is another prism through which micro-level decision-making is often viewed and which can be linked to well-being perspectives (Fassmann et al., 2018). Although each individual life follows its own course, similar patterns can be observed in the timing of events that are influenced by societal and biological factors (Wingens et al., 2011). Special attention has been paid to gender-specific differences, given that women's life course patterns may significantly differ due to factors such as childbirth and childcare (cf., e.g., Katz and Monk, 1993; Krüger and Baldus, 1999). Three main life-course transitions have been identified as potential triggers for migration: the transition from school or higher education to work, from unemployment to employment, and from living at home to living independently. The establishment of an own home is often connected with partnership formation or having children (King et al., 2016). According to the age-specific migration model of Bernard et al. (2014), the probability of migration is particularly high between the ages of 20 and 35.

In the past few decades, the Harris-Todaro model has been refined by several scholars (e.g. Borjas, 1990; Bauer and Zimmermann, 1998), who have included additional factors that influence the relationship. For instance, expected incomes do not depend only on earnings at the destination but also on the probability of getting an appropriate job. Similarly, expected costs include not only financial but also immaterial costs, e.g. psychological ones, which can be linked to well-being.

FURTHER CONTEMPORARY MIGRATION THEORIES

In the last quarter of the 20th century, international migration has undergone deep changes. While post-war global migration was mainly comprised of “large numbers moving from particular places to particular places” (from Algeria to France, from Turkey to Germany, from Mexico to the USA, etc.), we have witnessed even more people “moving from many places to many places” since the 1980s (Vertovec, 2010). The increasing complexity of international migration in terms of source and destination areas, migration channels, and the social characteristics of people who move has led to a growing interest in the topic from both the political and the scientific spheres, and to the development of a colourful *mosaic of contemporary theories*. In the next sub-sections, we will briefly review the most important concepts that are relevant to MIGWELL.

THE NEW ECONOMICS AND SOCIOLOGY OF MIGRATION: A MICRO-LEVEL APPROACH

In contrast to neoclassical models, the new economics and sociology of labour migration (NELM) underlines that migration decisions are usually made by *families and households*, rather than by isolated individuals. This perspective raises important questions concerning well-being (Stark and Bloom, 1985; Stark, 1991; Taylor, 1999; Szelényi, 2016). The theory is situated at the intersection of the micro and the meso-level and places greater emphasis on people's efforts to not only maximise their own gains but also to minimise risks to family income and to overcome capital constraints on family production activities (Stark and Levhari, 1982; Stark, 1984). In order to do this, households, particularly in developing countries, are interested in overcoming labour-market failures and diversifying their resources. This frequently results in transnational family formation. “While some family members can be assigned economic activities in the local economy, others may be sent to work in foreign labour markets where wages and employment conditions are negatively correlated or weakly correlated with those in the local area. In the event that local economic conditions deteriorate and activities there fail to bring in sufficient income, the household can rely on migrant remittances for support” (Massey et al., 1993: 436). Consequently, international migration and local employment are not mutually exclusive options.

The new economics and sociology of migration refutes the assumption that income is a homogeneous good that has the same effect on utility for everyone, regardless of their socio-economic status. The leading theorists of NELM pointed out that households do not only aim at increasing income in absolute terms but they also seek to improve their living standards and reduce their *relative deprivation* compared to other households and certain reference groups (Stark and Yitzhaki, 1988; Stark and Taylor, 1989; Stark, 1991). This implies that the probability of migration may grow or decline in response to changes in the incomes of other households (Massey et al., 1993: 438–439).

The wage or employment differences between two selected countries do not necessarily explain the direction and volume of migration flows *per se*. Thus, international movement would not stop when these gaps disappear. The likelihood of a positive migration decision depends mainly on the households' relative position within society. Even a decreasing average income gap between two countries may be coupled with intense emigration if relatively poor households are marginalised in the economic development of the sending country. Although households at the lower (not the lowest) end of the income distribution spectrum are more likely to migrate, this prediction does not hold for the most deprived households, because they cannot afford migration (Stark, 1991). Instead of individuals responding simply to the economic situation, we should rather see them as persons who are able and ready to act in order to improve the quality of life of their households.

The NELM approach presents several improvements in comparison with neoclassical models. However, there is a *debate* as to whether its ingredients constitute a distinct, coherent theory, or whether it should be seen only as a "critical, sophisticated variant of neoclassical theory" (Arango, 2000: 288). Faist (2000) identified further limitations of the NELM approach, such as its tendency of being biased towards the sending side and its limited applicability in less established migration contexts. Irregular migrants, refugees, and asylum seekers also challenge the general assumptions of the model. Furthermore, NELM does not adequately address household concerns and does not provide an adequate explanation for the movement of complete households (Arango, 2000).

Finally, it is important to acknowledge the close relationship between NELM and the theories of *household economics*. This field focuses on the internal structures, behavioural patterns, decision-making mechanisms and consumption patterns of households, as well as their interactions with the public and

private sectors of society.⁴ The goal of enhancing well-being is an important part of these concepts, where the feeling of self-exploitation seems to be a guiding principle (Szelényi, 2016; Melegh et al., 2018).

MACRO-STRUCTURAL MODELS

Besides the neoclassical macro approach, more recent models also emphasise the *macro-structural factors* of migration. These concepts tend to pay much less attention to micro-level decision processes and focus on forces operating at higher levels of aggregation. For instance, the dual labour-market theory links immigration with the structural requirements of modern industrial economies, while the world-systems theory sees immigration as a natural consequence of economic globalization and market penetration across national boundaries.

Dual labour-market theory

The concept of dual economy has been *interpreted in different ways* in the literature over time. In its original sense, it described the system of relations between traditional peasant farms and modern industrial-service formations, applied to the cases of third-world economies (Wertheim, 1968). In *migration studies*, the term dual (or segmented) labour-market theory refers to the dualistic economies of developed countries, which are structured to require a certain level of immigration (Piore, 1979). In these economies, there is a primary sector for secure, well-paid and comfortable work, and a secondary sector for low or unskilled jobs involving relatively poor working conditions. While native inhabitants take up more attractive jobs, the secondary jobs are frequently occupied by immigrants. In addition to the ageing of the native population, the structural inflation is also responsible for the growing demand for an external

⁴ There are two main streams of investigation. The unitary approach assumes that the household is acting as a single individual – i.e. as a consumption and production unit –, with a unique utility function and a common budget constraint. Typically, the head of the household controls the common resources and has altruistic preferences. The other household members aim to maximise their own preferences subject to their budget constraint set by the head of the household (Becker, 1979). In the collective household model, also known as the pluralistic decision-making model (e.g. Chiappori, 1992), each member has their own preferences and utility functions within the household. This model assumes that a household seeks to maximise the weighted average of each member's utilities, where the weights represent the members' ability to influence the decision-making process, also known as bargaining power. The total income is distributed among household members according to a sharing rule, and then each member strives to maximize their utility on their own.

labour force. This is coupled with the rise of proportional wages in the secondary sector, which makes these jobs unattractive for native workers.

Generally, the dual labour-market theory does not conflict with the neo-classical approaches and NELM. However, it presents a demand-driven concept in which the local populations' desire for maintaining a high standard of living can be easily identified. The theory suggests that the main driver of international immigration is, in fact, the developed economies' recruitment of a foreign labour force to fill jobs on the secondary labour market. The functioning of the overall economy (Jennissen, 2004) and, in a wider context, the maintenance or even increase in the level of well-being, are dependent on this pull factor. This factor has a stronger explanatory power than do international wage differentials or the wishes of individuals or households – as potential migrants – in the countries of origin (Massey et al., 1993).

This is the main source of *criticism*: the dual labour-market theory largely ignores the push factors in migration systems. Moreover, at the beginning of the 21st century, labour recruitment is less important than it used to be some decades earlier. Furthermore, the theory cannot explain different migration rates, i.e. “why different advanced industrial economies, which have similar economic structures, exhibit rates of immigration that may vary by a factor of ten, say between Denmark and Norway on the one hand and Switzerland or Canada on the other” (Arango, 2000: 290).

World-systems theory

The world-systems theory (Sassen, 1988, 1991) argues that international migration is a by-product of global capitalism, created by direct foreign investment in developing countries and the disruptions that such investment brings. On a global scale, most international migrants move from the periphery (poor countries) to the core (rich countries). This is due to factors associated with industrial development, which have generated structural economic problems (push factors) in the Third World. The routes of major international migration corridors are determined by former colonial relationships. As a *historical-structural paradigm*, world-systems theory mainly focuses on “how powerful elites oppress and exploit poor and vulnerable people, how capital seeks to recruit and exploit labour and how ideology and religion play a key role in justifying exploitation and injustice by making them appear as the normal and natural order of things” (De Haas, 2021: 4). The intrusion of capitalism into non- or semi-

capitalist systems is an important element in this framework. The world-systems theory does not consider the nation-state as the primary unit of analysis. Instead, it demonstrates a complex and nuanced model of global inequalities (Coccia, 2019).

Yet the theory has been *criticised* for presenting too many broad generalisations and for failing to present a falsifiable hypothesis (Massey et al., 1993). Given its broad scope, there is still a lack of empirically grounded studies justifying the hypotheses. However, macro-level modelling has successfully tested some of its elements (see e.g. Böröcz, 2014 on remittances; Melegh, 2023, chapter 3 on the role of foreign capital). Some critics have argued that the initial concept was overly reliant on economic causes of migration and paid insufficient attention to other, frequently meso-level factors (Frank and Gills, 1993). In fact, the world-system theory is a unified approach combining the spheres of economy, politics and society, and it can also provide a valid conceptual framework for understanding forced migration processes (e.g. Castles, 2003; Stepputat and Sørensen, 2014). At the same time, it assumes other factors, for instance social networks and socio-cultural moderators built into its ideas on developmental trajectories and historical migratory links. As Massey et al. (1993) underlined, to test the world-systems theory, one should also include indicators of prior colonial relationships, the prevalence of common languages, the intensity of trade relations, the existence of transportation and communication links, the relative frequency of communications and travel between countries, etc. Since the world-system theory focuses on structures without predicting behaviour, it is not directly related to the well-being issues, particularly its subjective components.

Migration transition model

In the migration transition model, Zelinsky (1971) has described how *migration patterns change* over time in response to changes in economic and political systems. This concept is the extension of the “classic” demographic transition model, which identifies five distinct phases. A pre-modern traditional society is characterised by high fertility and mortality rates and slow natural increase, while the extent of permanent migration is generally low. In an early transitional society, the growing concentration of employment in urban centres induces distinguishable rural-urban migration. Fertility rates remain high, but industrialisation is coupled with the improvement of public health and reduced mortality rates. In a late transitional society (stage three), population growth

slows considerably due to lowering fertility rates, while spatial mobility becomes more intense. New forms of spatial migration appear, such as circular migration patterns, commuting, retirement migration, etc. (Fassmann, 2011: 80). In general, urban-to-urban migration overtakes rural-to-urban migration.

According to Zelinsky's model, countries in the fourth or fifth phases are considered "advanced" or "super-advanced" societies. Stage four is characterised by the movement of people within metropolitan regions: from city to city and from city to suburbia. The rate of natural increase is close to zero. In phase five, the size of the post-industrial society decreases in absolute terms. In addition to the earlier movements of people within agglomerations, urban-to-rural migration becomes more important on account of better transportation and new telecommunication technologies (e.g., the Internet and home office).

The concept of subjective well-being may be incorporated into this theory by positing that the idea of mobility becomes a "normal" expectation as related to the advancement of individual social and economic well-being.

Migration cycles

As Fassmann et al. (2014) have underlined, international migration seems to follow partially overlapping and partially time-lagged migration cycles. The migration cycle theory can be considered a revised version of the transition model, which focuses on the process of the transformation of emigration countries into immigration countries and of the adaptation of their social and legal systems to the new conditions (Fassmann and Reeger, 2012: 66–68). The specific element of the model is the *gradual accommodation* to the new migratory circumstances, which are affected by changes in demography, economy, the labour market, etc. In the initial phase, the demographic situation remains relatively constant, and emigration is typically more important than immigration. In the transition stage, a former emigration country gradually becomes an immigration country, without the "official" acknowledgment of this transition in the political realm. In the adaptation stage, the legislative gap concerning migration and integration issues decreases, and immigration is acknowledged as a necessary supplement to economic growth and the demographically diminishing labour market. "A new political rationality emerges by integrating a means of controlling international migration into a differentiated legal system" (Fassmann et al., 2014: 24–25). This theory also pays little attention to subjective well-being.

NETWORK THEORY: A MESO-LEVEL APPROACH

In addition to macro-structural impacts and micro-level circumstances, the intermediate level has also gained increasing attention in the literature. Among the so-called meso-level factors, the response of *national and local policies* to macro-economic, macro-environmental and, more recently, global epidemiological processes (e.g. Guadagno, 2020), as well as certain intergovernmental organisations such as the International Organization for Migration (IOM) or the UN Refugee Agency (UNHCR) may also affect migration processes.

Social networks also play an essential role in stimulating migration by reducing the risks of migration, e.g. by providing information about opportunities to work or study in a foreign country. In this section we will focus on network theory, which focuses on explaining the “perpetuation” rather than the “initiation” of international migration (Massey et al., 1993).

According to this hypothesis, government policies and other macro-structural factors shape geographically bundled pathways, linking particular social groups and places across space. Once such initial patterns are set, migrant networks and feedback processes known as “cumulative causation” tend to give migration processes their own momentum and thereby reproduce such patterns (Massey, 1990; De Haas, 2021). Migration thus forges networks which then feed the very migration that created them. These networks can be interpreted as “sets of interpersonal ties that link migrants, former migrants, and non-migrants in origin and destination areas through the bonds of kinship, friendship, and shared community origin.” (Massey, 1988). The network itself *emerges as an actor* in the migration process because it influences migrants’ decisions regarding their migration destinations.

The concept of networks includes the assumption of a *risk-diversification model* and addresses the cumulative causes of migration as a result of reduced social, economic, and emotional costs, all of which are important for well-being. These provide support to both potential and newly arrived migrants. Such support could take the form of financial help, practical information to facilitate the migration process, job opportunities, etc. (Massey et al., 1993). According to this model, families allocate labour among their members within the constraints of their own needs and aspirations in a cost-efficient and risk-minimizing way. Given this choice, the reduced cost of migration increases the number of people who can and will choose to leave, thus increasing the volume of migration (Van Meeteren and Pereira, 2013). Therefore, whatever macro-societal

political or economic conditions may initially have caused migration, the expanding migration process becomes “progressively independent” of the original causal conditions.

By introducing a sociological dimension, network theory has improved the mechanical and economistic push-and-pull models as well as the world-systems concept (De Haas, 2010: 1587). However, although there is a general consensus that social networks play an important role in migration decisions, the exact nature of this role is still unclear. This *ambiguity* stems from the lack of reliable data on both migration and the structure of social networks (Blumenstock and Xu Tan, 2016). Existing research explains the expansion of established migrant networks, but generally fails to explain their initial, selective creation and different trajectories.

Van Meeteren and Pereira (2013) *criticise* the central argument of network theory as largely circular, assuming that migration continues *ad infinitum*. As such, it provides little insight into the feedback mechanisms that undermine migration and can lead to the breakdown of network systems over time (De Haas 2010: 1612). Other critiques of this approach have pointed to the relevance of ties beyond the community, such as employers, government officials, traffickers, and migration brokers (e.g. Krissman, 2005: 4ff.). Elrick and Lewandowska (2008: 718), for example, found that “agents” are significant actors in migrant networks who can be regarded as perpetrators of migration within these networks. Collyer (2005: 699ff) emphasised that social network theory cannot explain the migration flows of refugees and asylum seekers at all. The concept of well-being is also not an integral part of network theory.

ASPIRATIONS AND CAPABILITIES: A META-THEORETICAL FRAMEWORK

Based on his empirical observations in Morocco, De Haas (2021) points out that although local living conditions improve significantly, people’s overall aspirations may increase even faster. Growing aspirations – and, in parallel, growing capabilities – to migrate seem to be responsible for an increasing number of emigrants “despite, or paradoxically rather because of, significant improvements in local living standards”. This line of thought does not fit into mainstream migration models, but it is very important from a well-being perspective.

This meta-theoretical framework conceptualises different forms of migration as a function of *aspirations*⁵ and *capabilities* to migrate. While “migration aspirations are a function of people’s general life aspirations and perceived geographical opportunity structures”, migration capabilities “are contingent on positive (freedom to) and negative (freedom from) liberties” (De Haas, 2021: 17). These are conceptually distinct but empirically interconnected notions. For instance, improved education and growing media exposure may increase migration aspirations by expanding pupils’ awareness of alternative lifestyles and the relative nature of wealth. In other words, access to information per se tends to change people’s ideas about the “good life”. In this way, increasing capabilities can increase aspirations.

According to the aspirations–capabilities framework, migration should be seen as people’s capability to choose where to live – including the option to stay – rather than as the act of moving itself. Therefore, moving and staying are in fact complementary manifestations of migratory agency. As De Haas (2021: 30–32) argues, focusing research on people’s migratory aspirations and capabilities would help us better understand how processes of social transformation and development shape international migration patterns. In this meta-theoretical framework, the interconnection between migration and well-being is stronger than in any other migration theory to date.

WELL-BEING AND MIGRATION

RELATIONSHIP BETWEEN THE OBJECTIVE AND SUBJECTIVE DIMENSIONS OF WELL-BEING

The relationship between the material and subjective aspects of well-being is a relatively well-documented area of social sciences. This section will address this large body of literature only briefly, summarising the most influential theories on the link between individual financial situation and happiness and/or life satisfaction.

⁵ As De Haas has emphasized, migratory aspirations have two broad dimensions: instrumental (means-to-an-end) and intrinsic (i.e. well-being-affecting).

Theories on the nexus of income and subjective well-being

In the early studies by Easterlin (1974) and Scitovsky (1976), income and welfare played the main role as a source of happiness. The *absolute income hypothesis* states that people in a better economic situation tend to report higher life satisfaction than those in the same society who are less well-off (Diener, 1984: 553). However, the positive association between income and happiness tends to disappear in the long run. Thus, increasing welfare is often coupled with stagnating SWB. The so-called *Easterlin paradox* is an extensively discussed phenomenon in the literature (see e.g. Easterlin, 1974, 1995; Clark et al., 2008; Stevenson and Wolfers, 2006). The assumption is that once a person's basic material needs are met, their sense of happiness and/or life satisfaction is affected by other, predominantly immaterial aspects of well-being (Caporale et al., 2009).

According to the *theory of diminishing marginal utility*, increasing income is less important for the subjective well-being of wealthy people (Frey and Stutzer, 2002). However, the selection of the appropriate indicator is especially crucial here. Peiró (2006) found a stronger link between individual financial situation and life satisfaction than between the former and happiness.

The *relative income hypothesis* (published in its early form by Duesenberry, 1949) suggests that the utility of one's own income is evaluated through the prism of a chosen reference group that serves as a benchmark for comparison. Neighbours, friends, colleagues, particular social groups, the abstract category "people like you" – in terms of educational level, employment status, age, gender etc. – or even all other citizens of the same country may compose a reference group (Clark and Oswald, 1996; Clark and Senik, 2010; Easterlin 1995). How individuals feel about their well-being depends on the distance between their own individual income level and the reference value. This hypothesis emphasises the negative and asymmetric impact of the reference income on individual utility; upward comparisons – from below-the-reference income – seem to have a stronger impact on SWB than downward comparisons (Boyce et al., 2010; Dummludag, 2014). (For a detailed review of the role of comparisons, see e.g. Clark et al., 2008; Dummludag, 2014; and the next section below).

The negative impact portrayed by the relative income hypothesis is in sharp contrast with the *tunnel effect* (Hirschman and Rothschild, 1973), which occurs when the success of a reference group creates a basis for optimistic expectations and contributes to a positive SWB change. (The authors used the metaphor of a traffic jam in a tunnel. When the traffic in one lane starts to move,

drivers in the other lanes take this as an indication of “light at the end of the tunnel”.) Thus, as Caporale et al. (2009) point out, people may interpret any positive signals in adverse and uncertain situations to predict an improvement in their own situation sooner or later. The presence of the tunnel effect has been confirmed by, among others, Caporale et al. (2009) and Senik (2008).

The *income rank hypothesis* states that people’s self-rated life satisfaction is primarily influenced by the relative rank position of their income within their social comparison group. “Income and utility are not directly linked: Increasing an individual’s income will increase his or her utility only if ranked position also increases and will necessarily reduce the utility of others who will lose rank” (Boyce et al., 2010: 471). In other words, it is the ranked position of an individual’s income, rather than income per se or its relation to a reference income, that is beneficial for well-being (Quispe-Torreblanca et al., 2021). Several studies support the income rank hypothesis, including Clark and Senik (2014), Quispe-Torreblanca et al. (2021) and Wood et al. (2012).

The role of reference groups and social comparisons

Reference groups seem to play a key role in evaluating subjective well-being. Since the term itself was coined by Herbert Hyman (1942), it has provided useful insights into social behaviour and has been used to explain various behaviour patterns. A reference group is a group against which an individual evaluates his or her situation or conduct. The membership group and reference group can be the same or different; they are not mutually exclusive. The term reference group has been used in two ways: either as a group to which the individual aspires, or as a group whose values, norms, and attitudes serve as points of reference for the individual. In both cases, the crucial feature is that the individual adapts his or her attitudes and behaviour to model those of the members of the reference group.

The current understanding of the reference group assumes that reference groups change over the course of an individual’s life and that we select from a specific set of reference groups for comparison at a given time and in a given situation. A previously positive reference group may become negative over time (Newcomb, 1943). For some issues, a particular reference group will provide the basis for comparison, whereas for other issues, the reference group will be different. For example, our political attitudes are measured against a different group than our holiday habits.

THE SUBJECTIVE WELL-BEING – MIGRATION NEXUS: FURTHER LINKS AND PERSPECTIVES

Empirical studies and generalised conclusions

Although there is still no universal definition of happiness or life satisfaction, it is firmly believed that individuals usually act to improve their well-being and that this is the ultimate goal of their choices and actions (Selezneva, 2011: 140). From this perspective, voluntary migration can be considered a tool to reach the desired outcome of increasing well-being. However, while there is a vast amount of literature examining the nexus between material life conditions and migration as well as the material and subjective aspects of well-being separately, the third vertex of this theoretical triangle, namely *the SWB–migration nexus*, has only recently started gaining attention (e.g., IOM, 2013; OECD, 2017; Hendriks and Bartram, 2018).

Since very few international surveys are explicitly designed to measure migrants' well-being outcomes, yet little is known about the consequences of *migration for subjective well-being*, particularly about the effects of *SWB on migration intentions and/or decisions*.⁶ Empirical results suggest that migrants experience lower levels of life satisfaction than natives do in general (Baltatescu, 2007; Bobowik, 2011; OECD, 2017). Furthermore, second-generation immigrants seem to be unhappier than their first-generation counterparts (Safi, 2010; Senik, 2011), and emigrants are usually less satisfied with their lives than stayers (Bartram, 2011; Knight and Gunatilaka, 2010). These conclusions and explanations, however, are far from consistent, and other studies even show opposite results (e.g. Lengyel, 2012; Erlinghagen, 2012; Ivlevs, 2015).

The *divergence of findings* is not only attributable to obviously different historical and geographic contexts but also to the lack of a standardised and coherent theoretical framework. The investigations have predominantly used cross-sectional data to compare immigrants and natives in host countries (Baltatescu, 2007; Bartram, 2010; Safi, 2010; Göncz et al., 2012) or emigrants from

⁶ Previous studies have yielded diverge estimations of the degree to which migration intentions can be considered a good indicator of actual migration. Nevertheless, if migration is conceived as a selection process, then intentions and the actual act can be considered different phases of the whole process (Gödri and Feleký, 2013). There are not many longitudinal studies that can measure whether and to what extent intentions turn into the real act. A study conducted in the Netherlands between 2005 and 2007/2010 revealed that 24% of expressed intentions had turned into actual migration by 2007 and 34% by 2010 (Van Dalen and Henkens, 2013). Moreover, migration intention was found to be the main predictor of the actual act. A similar study in Hungary found that 20% of men and 12% of women had turned their migration intentions in 2003 into actual migration by 2007 (Hárs, 2008).

and stayers in the sending countries (Bartram, 2013; Erlinghagen, 2012). Although both approaches provide useful information, neither can adequately demonstrate a causal impact per se. On the one hand, simply comparing emigrants with similar people who remained in their country of origin can be misleading, since well-being gains may reflect unobserved differences in ability, risk tolerance, or motivation (McKenzie et al., 2010). On the other hand, neglecting pre-migration experiences obscures reverse causality, i.e., it does not rule out selectivity biases, whereby dissatisfied people may be more likely to migrate (Stillman et al., 2015). In the absence of longitudinal data, there are two alternatives:⁷ to create a two-period synthetic panel with statistical matching (e.g., Nikolova and Graham, 2015) or to ask respondents to estimate their general life satisfaction retrospectively, prior to and after migration (e.g., Amit and Riss, 2014).

In spite of these methodological concerns and somewhat divergent conclusions, a growing number of academic papers have demonstrated that the separation of material and immaterial determinants and their subjective perceptions does make sense because they can influence migration decisions and the post-move evaluations in different ways (e.g. Graham and Markowitz, 2011). Two *directions of SWB alterations* can be identified in the literature: increased versus decreased post-move life satisfaction (De Jong et al., 2002). Even though migrants' absolute incomes may rise, their original expectations can be met with disappointment and their SWB may be reduced. The reasons for this phenomenon can include the physical distance from their safe social and family networks, the linguistic and cultural distance from the host society, or the unexpectedly emerging frustration that stems from finding themselves in a lower position compared to members of the native population (Bartram, 2010: 2; Stillman et al., 2015: 86).⁸

The *set-point theory* claims that individuals have their own set points of SWB, which they revert to once the psychological impact of major life events has dissipated. However, substantial and permanent *upward or downward changes* in life satisfaction are also observable in the context of migration (Headey, 2008). As Nowok et al. (2011) have summarised, migrants often experience frustration and dissatisfaction before their departure, whereas they

⁷ For a unique exception see Stillman et al., 2015.

⁸ Cultural and linguistic differences create barriers implying "costs that potential migrants likely consider in deciding whether to migrate and where to go" (Adserà, 2015). However, the existence of large immigrant communities may encourage further moves and decrease migration costs (Pedersen et al., 2008).

feel happiness and high expectations during the process of migration but reduced SWB in the post-move phase. It also means that not only people's own past income and the reference group's living standard but also their expectations for the future are important elements of SWB-related comparisons.

The dynamics of these changes causes the *temporal fluidity of well-being*, which presents a remarkable methodological challenge for empirical studies (McGregor, 2007). This phenomenon is consistent with the relative income hypothesis mentioned in the previous section and has "similar DNA" with Brickman and Campbell's (1971) "hedonic treadmill" hypothesis from the psychology literature as well as "preference drift" from the economics literature (Van Praag, 1971). As Headey et al. (2008: 68) pointed out, people tend to "change their preferences in response to what others have and want". Since aspirations and social relationships are in constant flux, what really matters in the assessment of one's quality of life may also change as a consequence of adaptation to the new external circumstances (Nussbaum, 2001; Quizilbash, 2006). In the context of migration, this process entails the change of the reference groups too – e.g., new neighbours, new colleagues, and a new host society, very often with higher average living standards. Thus, when immigrants change their reference group, the comparisons they make may become less favourable, resulting in a deterioration of their subjective well-being, despite an improvement in their objective situation.

Finally, researchers have to "find ways of assessing how well people are doing in their achievements in respect of the things that they regard as important for them to live well" (McGregor et al., 2015: 2). Therefore, besides simply measuring different SWB components, for instance satisfaction with income or social relationships, we also have to understand the relative importance of these areas of life for the respondents.

The theoretical background of the mechanisms mentioned in this section, including differences between the short-term and long-term dimensions of evaluation, is still not well grounded. Qualitative methods can provide important insight into the dynamics of the adaptive preferences, the changing reference groups, the relational dimension of well-being, etc.

Social connectedness and subjective well-being

The nexus between subjective well-being and the concepts of social capital (Bourdieu, 1986; Coleman, 1990; Putnam, 1995; Tzanakis, 2013; etc.) and social cohesion (e.g. Chan et al., 2006; Dragolov et al., 2016; Schiefer and Noll, 2017)

has been gaining increasing attention in the literature. These are closely inter-related concepts, but aggregated indicators of cohesion are more appropriate for macro analyses, whereas data on the individual level should be used to analyse the relationship between social capital and subjective well-being (Klein, 2013). Nevertheless, while studies have found positive links between social connectedness and life satisfaction in general (e.g. Anheier et al., 2004; Bjørnskov, 2003; Dragolov et al., 2018), relatively few have considered the impact of social networks on SWB within immigrant communities (e.g. Xu and Palmer, 2011; Tegegne and Glanville, 2018).

Familial relations definitely belong to the key factors that potentially shape migrants' subjective well-being and its relationship with their decisions to move or stay. Melegh (1999) pointed out that the life history perspective on migration is often influenced by whether family relationship broke down during migration or whether they developed further. Preliminary qualitative studies have also revealed that not only the way migrants narrate their life history is shaped by gender-specific differences, but their perceptions of subjective well-being is also often "gendered". Central European migrants tend to frame their own migration in terms of well-being, and the narrative of *familial well-being* is quite common, particularly among female respondents (Kovács and Melegh, 2001; Melegh and Kovács, 2008).

The success of *integration* might also be an important factor in migrants' SWB changes. In general, integration refers to the process by which migrants become accepted into society, both as individuals and as groups. It is a two-way process of adaptation – and in another aspect, a form of acculturation – that requires efforts both from migrants and from the host society. Ultimately, it is useless for a person to be ready to integrate if the host environment does not support him or her in this process. The changes that immigrants undergo involves at least six areas: language, cognitive styles, personality, identity, attitudes, and acculturative stress. The cause of problematic outcomes often stems from the different acculturation expectations of the host society and the acculturation orientation adopted by the immigrants (Bourish et al., 1997; Van Oudenhoven et al., 1998). Investigating the social connections between migrants and members of the host population (and the subjective perceptions of these relationships) is essential for a better understanding of the SWB-migration nexus.

Migratory aspirations, capabilities and subjective well-being

In the aspirations-capabilities framework, migration and subjective well-being are connected on two levels. Firstly, De Haas' concept is heavily inspired by Amartya Sen's (1999) *capabilities* approach to human well-being. De Haas emphasised that people could derive well-being from having potential access to mobility freedom, irrespective of whether they applied these freedoms. "The central idea is that the very awareness of having the freedom to move and migrate can add to people's life satisfaction, in the same way that freedom of speech and religion, the right to organise protest marches or to run for office can contribute to people's well-being, irrespective of whether or not they eventually use those freedoms. Conversely, if people do not enjoy such freedom, they are likely to experience this as a form of well-being-decreasing deprivation" (De Haas, 2021: 18). Regarding migratory *aspirations*, the other main pillar of the concept, De Haas expanded the notion of migratory agency into the subjective realm. Migration aspirations reflect people's general life preferences and their subjective perceptions of the quality of life in their current place of residence, as well as their subjective perceptions of opportunities elsewhere. This line of thought is consistent with many other well-being approaches and, to a certain extent, with the assumptions of the transition theory.

A POSSIBLE RESEARCH STRATEGY: THE CONCEPTUAL FRAMEWORK OF MIGWELL

MIGRATION THEORIES RELEVANT TO THE PROJECT

The migration theories that were previously summarised are not necessarily contradictory. The causal processes relevant to international migration might operate on multiple levels simultaneously. It is entirely possible that individuals engage in cost-benefit calculations to maximise income, households act to minimise risks, and the socioeconomic context within which these decisions are made is determined by structural forces operating at national and international levels (Papademetriou and Martin, 1991). As Castles et al. (2014) have stressed, each of these theories has their place, and a full understanding of migration requires contributions from a range of perspectives.

Thus, instead of building on a single migration theory, MIGWELL incorporates elements from various conceptual frameworks. For the purposes of this

project, *micro- and meso-level approaches* are especially relevant. Although the concept of well-being has long been absent from migration theories, the new economics and sociology of migration (NELM) have already highlighted the importance of perceived deprivation and some other subjective aspects of migration decision-making. According to NELM, migration might be an option for households towards obtaining a sustainable livelihood by avoiding deterioration of household poverty and improving capabilities and resilience. The push-and-pull concept is widely considered relatively outdated. Yet, push-and-pull factors might serve as useful tools. These notions might offer a meaningful and easy-to-understand way for people to evaluate and interpret their individual migration decisions in the context of subjective well-being. Since the existence of migrant networks can play a significant role in the decision-making process, as well as in post-move subjective well-being changes, people's connections with the expatriate community will also be surveyed. This endeavour requires the consideration of network theory as a meso-level approach.

Migration cycles provide a key *macro-level* concept to place the Hungary-Austria migration nexus into a wider context. Although European countries do not necessarily pass through these phases in this exact order or at the same pace, and although the model of migration cycles does not explicitly reflect the liquid forms of migration, the concept helps us to grasp the dynamics of international migration transition in Europe.⁹ The dual labour market theory might also be relevant. People's labour-market positioning before and after migration, and their relationship with their income and subjective well-being is an important aspect of this project. Finally, the aspirations-capabilities approach is also important in assessing non-migration, emigration and return migration.

THE CONCEPT OF WELL-BEING

As the secondary data sources of the project principally follow the OECD Guidelines on Measuring Subjective Well-being, all of their SWB variables are necessary for a comparative analysis. As the recommended question modules suggest, "overall life evaluations should be assessed first, followed by eudai-

⁹ Austria, for instance, is a typical immigration country where the socio-demographic challenges of the welfare state – such as population ageing leading to increased pressure on the healthcare and elderly care system (Katona and Melegh, 2020) – induce an increasing demand for immigrant workers. Hungary is in a transition phase where both directions of migration flow are similarly important, although its migration balance is negative in relation to Austria and other Western countries.

monic well-being, with more specific questions about recent affective experiences asked next and domain-specific questions last” (OECD, 2013a: 161–171) (*Table 2*).

As already indicated, these theoretical approaches grasp subjective well-being from different directions, and in fact all of them are necessary to measure it as accurately as possible. This is true at both the micro and macro levels. In other words, it is possible to construct a SWB profile for a single individual, but eventually the aggregated SWB profiles enable us to study the SWB patterns of different social groups or societies as a whole.

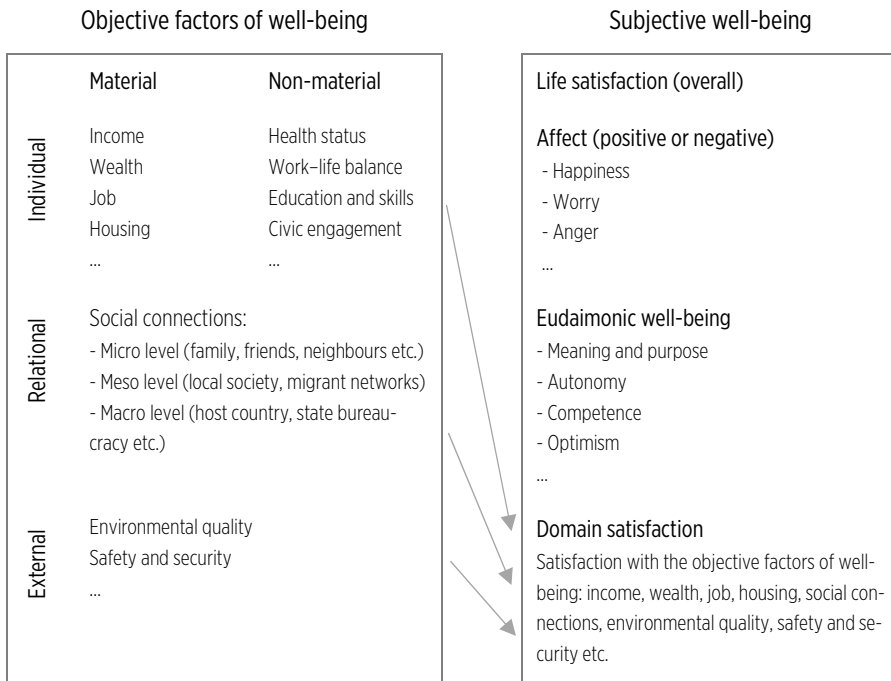
However, subjective well-being cannot be sufficiently measured in isolation, without considering the resources that people have and the relationships that influence their actions (McGregor, 2007). Therefore, subjective reflection on life satisfaction, affect, and eudaimonia will be our focal points – again, based on the pre-defined EU-SILC variables that are essential for a comparative analysis. Additional sets of questions on the material and relational dimensions are expected to provide deeper insight into the dynamics of the migration–SWB nexus. (Examples of methodological adaptations can be found, e.g., in Britton and Coulthard, 2013 and Te Lintelo et al., 2018.)

Therefore, we should apply a hybrid approach in conceiving well-being, inspired by both the OECD and the WeD concepts (*Figure 1*).

In practice, our goal is to identify some relevant, objective, and observable factors of well-being (household income, employment status, housing quality, etc.) and the social connections that people perceive as the most important in terms of the degree of their influence on migration behaviour and SWB. Respondents should identify, evaluate, and rank their relationships by importance. On the one hand, the strongest influence on migration decisions might be associated with macro-level (e.g., dissatisfaction with salary or state bureaucracy), meso-level (e.g., tensions within the community, dissatisfaction with the quality of local public services)¹⁰ or even micro-level relationships such as familial relations.

¹⁰ Migali and Scipioni (2019) pointed out that migration potential tends to increase significantly along with people’s decreasing satisfaction with local public services, e.g., healthcare or educational institutions, and that the influence of this relationship can be stronger than that of income.

Figure 1: The relationship between the objective and subjective dimensions of well-being on a personal level



Conversely, connections with the expatriate community will also be surveyed because migrant networks can play a significant role in reducing migration costs and stimulating migration. Furthermore, since people's choices and actions are shaped by the social contexts in which they are embedded, this is where the role of the "reference group" – a prism through which one's own income and other well-being factors might be evaluated – will also be investigated. While the success of a reference group might create a basis for optimistic expectations, the change of the host society as a major reference group – i.e., higher living standards in Austria – might cause frustration and decreased SWB per se. Since the narrative of familial well-being is traditionally strong in the case of Central European migrants (Melegh and Kovács, 2008), we should also survey family relationships.

RESEARCH DESIGN

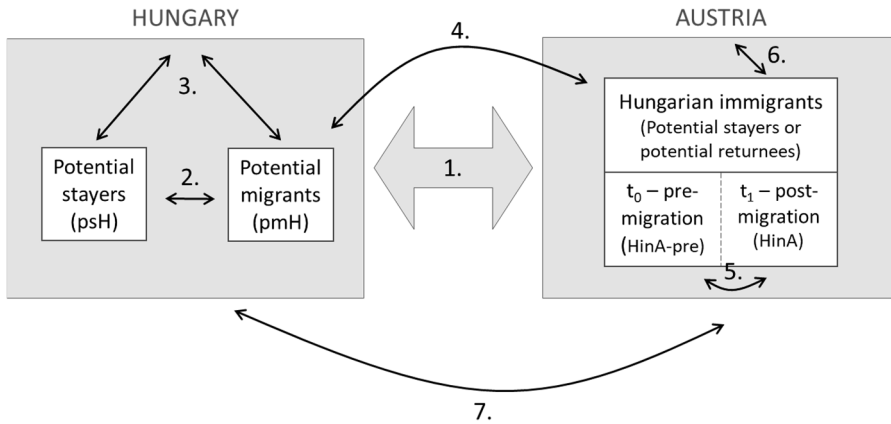
The causal relationship between migration and subjective well-being has only recently began to receive attention and this new literature still suffers from some pitfalls. For instance, the studies predominantly focus on the effects of migration on SWB, yet we know little about the effects of SWB on migration intentions and decisions. These investigations use mostly cross-sectional data concentrating on the host countries and neglecting the dynamic aspect, i.e., immigrants' SWB prior to their migration. A significant proportion of the existing literature has yet to empirically test the accumulated hypotheses regarding the mechanisms of SWB changes in the context of migration. The research mostly applies a rather narrow approach of overall life satisfaction and pays less attention to other measurement concepts. The studies do not regularly investigate the impact of uncertainty on migration potential and SWB, which might play an important role in the era of global "multicrisis", including climate change, pandemic, wars, energy shortage, food crisis, etc.

The MIGWELL project aims at addressing the aforementioned neglected issues. Its *innovative approach* is not simply the strong linkage of subjective well-being and migration, but rather the attempt to understand their two-way relationship within one research framework. The aim of this project, in its simplest and shortest form, is to answer the following research questions.

- *Austria-Hungary SWB gap*. Which objective indicators are responsible for the vertical and horizontal inequalities and the country-level differences in subjective well-being?
- *SWB → migration nexus*. How does subjective well-being influence intentions and/or decisions either to stay or to migrate among the Hungarian population?
- *Migration → SWB nexus*. How does migration affect the subjective well-being of Hungarians after moving to Austria? Has the perception of their well-being improved in line with their material gains or has it failed to reach the expected level?

To approach the subject, we have elaborated a distinct research framework that highlights the relationships between the analytical groups (*Figure 2*). This analytical framework is project-specific and not intended to be a universal guideline applicable to all situations in all circumstances. However, the logical structure may help other researchers conduct research projects with the explicit aim of grasping the two-way relationship between migration and subjective well-being.

Figure 2: Logical structure of the project



Notes: The abbreviations make it easier to identify the target groups in the following sections.

Legend: psH: potential stayers in Hungary, pmH: potential migrants in Hungary, HinA-pre: pre-migration information about Hungarians living in Austria, HinA: current information about Hungarians living in Austria.

Based on this research framework, the following outcomes are expected:

1) Theoretical expansion of the main concepts

- After a series of adjustments, the proposed research structure is now suitable for integrating both directions of the relationship into one conceptual framework: the change of SWB as a consequence of migration and the effects of SWB on migration potential.
- Moving away from the traditional utilitarian approaches, the project will help us to adequately capture the underlying complexity of SWB and its relationship with objective material and social factors.
- Analysing macro trends of changing well-being scores, we will answer the question whether overall SWB tends to revert to a set point once the direct impacts of a shocking event (e.g. Covid-19) have dissipated, or whether life satisfaction permanently changes.
- The project will provide a dynamic perspective and allow for empirical tests of hypotheses regarding the mechanisms of SWB alterations in the context of migration (absolute or relative income hypotheses, income rank hypothesis etc.).

2) Explaining concrete migration processes by applying the concept of well-being

Applying a mixed-method approach, the project is expected to shed light on:

- The Austria–Hungary SWB gap
We will examine the main differences in subjective well-being patterns and their objective drivers in Hungary and Austria, contextualize the subsequent research activities, and enable a better understanding of the drivers behind migration across the “iron curtain of unhappiness”. The availability of secondary data from 2013 to 2022 enables a temporal analysis of the changing macro-structural conditions and the impacts of the pandemic on the migration flow and the SWB gap between Austria and Hungary (*relation 1 in Figure 2*).
- The SWB → migration nexus
 - We will also shed light on the way in which material aspects and social relationships influence subjective well-being and how SWB affects migration intentions/decisions. Furthermore, we will capture the circumstances under which non-material factors may or may not counter-balance the importance of material aspects for potential stayers and migrants in Hungary (psH, pmH), along with the reasons for and means of being able to do so. *Relation 2* will be used to answer the question whether dissatisfied people are more likely to show a higher emigration intention or whether the opposite is true.
 - The direction of change in the mean values of key SWB variables in Hungary between 2013 and 2022, and the way in which this trend has influenced migration intentions, will be investigated. The comparative analysis will answer the question of whether the migration potential has increased or decreased in general (*relation 3*).
 - The next question is whether the pre-move SWB pattern for Hungarian emigrants (HinA-pre) was similar to or different from that of the Hungarian ‘average’. The same question can also be asked about potential migrants and stayers at the time of conducting the survey. *Relation 4* will identify the permanent and strongest factors that have been playing a crucial role in the assessment of life satisfaction and migration decisions over a longer period and will shed light on how migration intentions are in fact realized.

- The migration → SWB nexus
 - The object of this survey is the dynamics of SWB change in relation to material gains and social relationships as a consequence of migrating to and living in Austria. Although there will be no opportunity to combine pre- and post-migration observations of the same persons within the time span of the project, the research framework allows for two indirect approaches towards studying this nexus: surveying respondents' retrospective evaluation prior to and after migration, and comparing sub-samples of similar socio-economic statuses at different stages of migration. These methods serve not only to confirm or reject Nowok's hypothesis of an inverted U-curve regarding chronology, but also to shed light on the differences between the short- and long-term dimensions of evaluation (for the duration of living in Austria) (*relation 5*).
 - We will furthermore enquire whether increased or decreased post-move satisfaction is a result of the mechanisms described by, e.g., the absolute or relative income hypotheses or whether people's perceptions of the constituents of well-being have also changed through migration (adaptation, temporal fluidity of well-being, changing reference group). Apart from the retrospective reports (HinA-pre), identifying the patterns of key SWB variables in the host country is also necessary to triangulate this comparative analysis (*relations 5 and 6*).
 - We will identify the similarities and differences between Hungarian immigrants' pre-move expectations toward and post-move experiences with migration-induced SWB change (HinA, HinA-pre), and compare these with the current expectations of potential emigrants from Hungary, who might have similar aspirations (pmH). If potential emigrants consider successful emigrants as a reference group, this analysis may justify the existence of the tunnel effect and furthermore highlight the importance of migrant networks (*relations 5 and 7*).
 - Retrospective evaluation will also be useful in the case of returnees, who constitute a subgroup within the main analytical groups in Hungary. Returnees' reflections on the material, social, and subjective dimensions of well-being – parallel to those of the Hungarians

who have remained in Austria – may provide valuable information about the mechanisms of individual and familial decision-making during the Covid-19 crisis. Besides the international macro statistics, narrative interviews will also enable micro-level estimations of the impact of the pandemic and its longer-term economic consequences for migration processes.

3) Facilitating effective policy through improved theory and empirical results

Although MIGWELL is first and foremost a research project, its target audience also includes policy makers. The project is expected to facilitate more effective policy interventions in both countries by improving the understanding of the SWB-migration nexus. In a later stage of the MIGWELL project, we will develop an open access policy recommendation paper, which we expect to publish in 2025.

SUMMARY

This study was not intended to provide a new migration theory. Instead, we sought to identify links between subjective well-being and migration by reviewing existing migration theories. Why?

We argue that subjective well-being should be a key concept in migration research because increasing subjective well-being is a universal human desire. If people have the possibility to make a decision, they make these choices – at the individual and/or household level – with the aim of being happier and more satisfied than before, and not the other way round. From this point of view, migration itself – or even the choice of staying – can be regarded as a strategic decision to increase subjective well-being.

Of course, the relative importance of material and non-material factors to happiness, satisfaction and eudaimonic well-being is an individual and situational matter. The use of a standardised measurement methodology enables the construction of an individual SWB profile for everyone, and a longitudinal study could detect even the temporal changes in this profile. Nevertheless, based on the aggregated SWB profiles, we can study and compare the SWB patterns of certain social groups; even in the context of migration.

This concept paper has provided an overview of the relevant theoretical frameworks of well-being and migration and the links between the two concepts. As we have underlined, an investigation into their causal relationship

would in fact require a longitudinal study. However, longitudinal studies are very rare in practice, due to the financial and technical difficulties involved in implementation. In this paper, we have proposed a research framework which may be suitable (with some limitations) to capture the two-way relationship between migration and subjective well-being.

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