

Editorial Introduction: Exploring Return Migration and its Transformative Potential in Romania and Beyond

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International migration - social change nexus¹

International migration is widely regarded as one of the most pivotal social processes in contemporary times. The substantial surge in migration volumes, migration patterns, and the evolving nature of these flows over the past decades have spurred extensive academic discourse. A significant portion of this substantial body of literature primarily centers on emigration dynamics and the integration of migrants within destination countries (King 2018; Portes and Rumbaut, 2014).

However, there is an increasing acknowledgment within academic circles of the importance of migrants' origins, a shift partially attributed to the migration-development discourse that has gained prominence in recent decades. Additionally, a growing body of scholarship aims to grasp the multiple way in which migration is part and parcel of wider societal transformations thereby broadening the scope of academic inquiry to encompass migrants' origin contexts (Schiller and Faist, 2010).

Social change

Existing literature widely acknowledges the intricate interconnection between migration and societal transformation. Despite years of research on these topics, the potential impacts of international migration on countries of origin

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remain a subject of ongoing debate. One of the fundamental reasons for this ongoing discourse lies in the lack of consensus regarding the definition and mechanisms of change within the context of migration.

The concept of 'change' has been a focal point in sociological inquiry since the inception of the discipline. However, its interpretation has evolved over time, mirroring major paradigm shifts in social and development theories (Ziai, 2009). These shifts have reverberated in discussions concerning the role of migration in changing both destination and origin countries (de Bree et al., 2010). Initially, discussions in the 1960s surrounding the potential of migration to induce change in destination and origin countries revolved around the term 'development.' However, the notion of 'development' encompassed various interpretations, ranging from economic growth based on neoclassical growth theories to modernization or the expansion of productive forces from a Marxist perspective (Snowdon and Vane, 1997).

In more contemporary literature, 'development' has shifted towards a concept associated with progress towards a specific positive goal. Seeking an alternative lens for conceptualizing change within the migration discourse, scholars have introduced the concept of 'social transformation.' This shift stems from the critique that 'development' harbors normative biases and perpetuates a modernist and Eurocentric view of change (Alexander, 1994). 'Social transformation' refers to profound structural modifications in societal relations, positioning migration as an integral part of broader social transformations (Amelina et al. 2016).

Consequently, understanding the impact of migration on countries of origin necessitates differentiation based on various factors: the broader contextual elements (e.g. economic, institutional, legal), the level of analysis (micro, meso, and macro), and the dimensions considered (income, conflict resolution, inequalities, etc.) (van Hear, 2010; de Haas, 2012; Castles, 2010; Portes, 2010, Rusu et al. 2023). This multifaceted approach allows for a nuanced examination of migration's effects on origin countries across diverse contexts, levels, and dimensions.

Social change in the return migration context

The persistence of disagreements regarding migration implications stems from prevalent dichotomous perspectives within existing studies: the 'migration optimist' and 'migration pessimist' viewpoints. The dominant perspective has historically shifted, oscillating from a rather optimistic stance in the post-war era to a pessimistic outlook in the 1980s, and eventually returning to a more optimistic viewpoint after the 1990s (de Haas, 2012; Faist, 2008).

The 'migration optimists' draw from theories such as neoclassical migration economics, 'developmentalist' modernization theories, and the New Economics of Labour Migration (NELM). They argue that migration yields favorable impacts on the countries of origin for migrants (Todaro, 1969; Massey and Parrado, 1998). Conversely, the 'migration pessimists' primarily lean on structuralist approaches, contending that migration discourages economic and social changes in the countries of origin (Wallerstein, 1974; Papademetriou, 1985).

In the context of countries of origin, the migration-development literature revolves around three primary channels: the absence/presence of individuals, transnationalism, and return migration. Regarding the absence/presence of individuals, the pessimistic perspective suggests that outmigration diminishes a region's population and subsequently reduces its labor supply, especially among highly skilled individuals (Parrado and Gutierrez, 2016). However, arguments derived from the neoclassical approach counter this assertion, highlighting that not all migrants were initially part of the labor force and that a reduced labor force can potentially lead to increased wages/income, stimulating incentives for labor force expansion and reducing unemployment (Massey and Parrado, 1998; Lucas, 2005).

This rather optimistic perspective was later challenged, particularly within the 'brain drain' discourse, which emphasized the problematic nature of emigrating highly educated individuals for the development of origin countries. This was due to their scarcity and crucial role in the development of developing nations, especially considering their over-representation

among emigrants. However, this pessimistic viewpoint has faced challenges, notably within the NELM literature. Arguments against this perspective highlighted that the possibility of emigration can incentivize further education and skill acquisition among the local population who, for various reasons, do not migrate, thereby potentially raising the overall education level (Porumbescu 2015; Chiswick, 2000; Stark, 2003).

Transnationalism constitutes another more recent yet significant pathway in discussions concerning the linkage between migration and development in countries experiencing emigration. The increasing focus on financial and social remittances within the migration-development framework reflects a shift from perceiving outmigration as a definitive process wherein migrants sever ties with their origin communities to a transnational perspective emphasizing migrants' tendencies to maintain connections bridging their destination and origin locales (Schiller and Faist, 2010).

The optimistic viewpoint posits that remittances, broadly defined as the transfer of money (financial remittances) and the transmission of knowledge and societal concepts (social remittances), can lead to various changes in the countries of origin for migrants. Specifically, financial remittances have been observed to diminish poverty, augment investment, and enhance access to education and healthcare services, directly contributing to enhancements in social welfare and economic development in origin countries. Although financial remittances were prominently discussed in literature for several decades, recent scholarly attention increasingly underscores the significance of non-financial aspects in the transformative processes of emigration countries (Tulbure, 2022; Levitt, 1998; Faist, 2008; Guarnizo and Smith, 1998).

Social remittances, broadly encompassing ideas, behaviors, values, and social capital traversing borders (Levitt, 1998; Levitt and Lamba-Nieves, 2011), have been identified as contributors to technology and knowledge transfer, fostering foreign investment, promoting entrepreneurial endeavors, and facilitating the propagation of ideas and behaviors. Consequently, they directly contribute to enhancing economic development and overall well-being in countries of origin (Corman and Croitoru 2023; Anghel 2019; Popa, 2022; Apsite-Berina et al. 2020).

Contrarily, 'revisionist' perspectives adopt a critical stance on this nexus, arguing that financial remittances sent back by migrants are primarily utilized for consumption rather than entrepreneurial activities, potentially fostering a disincentive to engage in productive work among households receiving financial remittances. In turn, this may lead to increased dependency on external financial resources (Massey et al., 1998). Furthermore, scholars have explored potential adverse effects of financial remittances, including price inflation, deteriorating export competitiveness due to currency appreciation, and exacerbated social inequality (Ball et al., 2013; Lopez et al. 2007).

Additional concerns highlight constraints faced by migrants aiming to introduce changes or development initiatives in their origin countries. These constraints encompass inadequate market opportunities or a lack of transparency, limiting the impact of social remittances and desired development initiatives (King et al. 2016, Ducu and Telegdi-Csetri 2023).

The migration-social change nexus scholarship delves into the third category of impacts, which revolves around the process of return migration. In discussions about the benefits and drawbacks associated with international migration, return migration holds significant relevance. Return migrants are individuals who, after an extended period living in other countries, opt to return to their country of origin, where they were born or where their parents were born in the case of second-generation return migration (Sironi et al., 2019; Cassarino, 2004). Unlike earlier perceptions that regarded return migration as the concluding phase in the migration cycle, contemporary literature increasingly portrays migrants as actively maintaining connections between their origin and destination countries while re-evaluating their migration paths and potential re-entry into migratory patterns. Importantly, returnees are not exclusively individuals who had unsuccessful migration experiences in host countries, as some return by choice (Oltean, 2019; Engbersen and Snel, 2013).

Debates on the potential impacts of return migration on destination countries echo arguments from preceding literature streams. From a labor supply perspective, return migration is perceived as broadening the labor force and introducing new skills to the labor market of the origin country.

Additionally, migrants often accumulate financial, human, or social capital during their time abroad, making their return pivotal for transferring these forms of capital to benefit the origin country. Moreover, returnees can sustain transnational practices as they often maintain connections with former destination countries, perpetuating the flow of money, ideas, and knowledge between these destinations and others. These processes significantly contribute to the economic development of the origin country and foster transformations in values or behaviors within origin communities (Vlase 2013; Ammassari, 2004; Faist, 2016; Tomić-Hornstein, 2018).

Conversely, pessimistic perspectives highlight that not all returnees actively contribute to social change upon their return; some may return to retire or might not engage actively in economic or social activities. Additionally, concerns arise regarding the applicability of skills and knowledge acquired abroad in the origin countries, as these skills might be location or field-specific and not easily transferable (Bertelli, 2021; Cassarino, 2004; Klagge and Klein-Hitpass, 2010).

Return migrants as social change actors

A prevalent framework employed to elucidate the impact of returnee migrants in their home countries stems from the sociological perspective of embedded social action, specifically through the theory of practice as articulated by Bourdieu (1977, 1986). This theory delineates how individuals' actions and pursuits, such as those undertaken by returning migrants, are moulded by their utilisation and amalgamation of diverse forms of capitals. This approach revolves around three core concepts: a) habitus; b) field; and c) capital. Habitus encompasses "acquired and inherited dispositions, mental structures, and cognitive frameworks governing actors' ideas and actions within a specific field." Fields denote "the social structures and distinct settings wherein actors carry out their practices." Capital assumes four forms: a) economic (resources with explicit economic worth); b) cultural (formal qualifications or acquired experiences); c) symbolic (esteem, trust, and

recognition); and d) social (interpersonal relationships and networks among individuals).

Within this framework, it is posited that the notable success and impact of returnees on their home countries emanate from the unique intersection of distinctive mindsets (i.e. *habitus*) and the acquisition and utilisation of resources (economic, social, symbolic, and cultural capital) within diverse institutional environments (i.e. *fields*) (Anghel and Foszto, 2022; Elam and Terjesen, 2009; Drori et al. 2009). Essentially, findings indicate that while residing abroad, migrants can amass or refine their: economic capital, enabling them, for instance, to navigate credit constraints encountered when establishing businesses in their home countries; cultural beliefs and values experimented abroad can spur a propensity for risk-taking; symbolic capital can bolster reputation and credibility; social connections can function as means to mobilize diverse resources available within networks (e.g., labor force, support, information) (Bermudez and Paraschivescu, 2021; Gubert and Nordman, 2008; Porumbescu and Pogan, 2018; Hamdouch and Wahba, 2015; Mesnard, 2004)

Another significant body of literature explores the impact of return migration from a knowledge-based standpoint where knowledge is regarded as a pivotal factor driving economic development and socio-economic transformation. This line of inquiry contends that return migrants can serve as crucial innovators and conceptualizes knowledge in alignment with Bourdieu's notion of 'incorporated cultural capital' – encompassing skills, experiences, values, attitudes, and competences acquired and internalized by individuals (Radogna 2022; Klagge and Klein-Hitpaß, 2010; Bourdieu, 1986).

Essentially, the argument posits that migrants can play a pivotal role in driving socio-economic transformation in their home countries primarily by facilitating knowledge transfer from abroad. While all returnees gather experience during their mobility abroad, the inclination towards changes in the origin communities among specific returnees is not solely contingent upon knowledge accumulation alone. Rather, it hinges on a) the 'quality' of knowledge amassed abroad and b) the 'utility' of this accrued knowledge upon its transfer back home. Moreover, the enhanced impact of returnees

appears linked to their capacity to leverage the knowledge acquired abroad to generate new knowledge (Lin et al., 2016; Dew et al. 2004).

A critical distinction within this process lies between tacit and explicit forms of knowledge, elucidating how it can be learned, transferred, integrated, and applied within the home context. Tacit knowledge, stemming from applied experiences in specific settings, is often more challenging to transfer, while explicit (codified) knowledge can be documented and communicated more readily (Polanyi, 1967). Consequently, it is the tacit form of knowledge, intricate to systematise and transfer, that furnishes returnees with a competitive edge. Three primary forms of tacit knowledge stand out as instrumental for return migrants: technological knowledge (e.g., hi-tech expertise), international market information (including market characteristics, institutional intricacies, cultural nuances, etc.), and social network knowledge (pertaining to social networks) (Collins, 2007).

The knowledge-based perspective primarily focuses on the internal acquisition and transfer of knowledge within each individual or organization network. Conversely, the social capital theory centres on the external acquisition and transfer of knowledge through social networks. In this context, returnees are not solely bearers of knowledge, transferring their own skills from the destination to the origin country. They also serve as connectors to social networks abroad, thereby facilitating an ongoing transfer of knowledge (Klagge and Klein-Hitpaß, 2010). Despite its significant role in social research, social capital continues to be defined and measured in various coexisting ways (Portes, 2010). For example, Bourdieu and Wacquant (1992: 119) define social capital as "the sum of the resources, actual or virtual, that accrue to an individual or a group by virtue of possessing a durable network of more or less institutionalised relationships of mutual acquaintance and recognition."

Another widely embraced interpretation of social capital, as outlined by Coleman (1988: 103), revolves around social networks serving as repositories of capital resources for individuals by establishing "obligations, expectations, and trustworthiness, creating channels for information, and setting norms backed by efficient sanctions." Furthermore, an extensively acknowledged perspective on social capital delineates it as comprising: a) resources inherent

within the network, b) access to these embedded resources through the network available, and c) the proficient utilisation of these resources (Lin, 2002).

The relevance of social capital to the discourse on the impact of returnees on countries of origin is multifaceted. Notably, social capital is believed to facilitate returnees' access to external knowledge beyond what the individual or the organisation internally possesses, thereby enhancing their potential impact. Within this framework, the concept of 'structural holes,' also categorized as a form of social capital by Burt (1992), elucidates how individuals can function as intermediaries, bridging two or more networks that are typically not directly connected. Consequently, the international experiences of returnees are often linked to the cultivation of social networks abroad, such as those in their former destination or other countries. Hence, returnees effectively serve as intermediaries between social networks in their home country, destination, and other nations, enabling access to valuable resources within these networks. Furthermore, drawing from Granovetter's (1985) distinctions between weak and strong ties, (Pruthi, 2014) delineates between these ties based on the frequency, quality, and intensity of relationships. It is argued in this framework that migrants distinctly utilize these ties, contingent upon the location of their endeavors.

This special issue

The special issue brings together five contributions from young yet very promising scholars dealing with the topic of return migration in its multitude of forms, from the intention to return to the return of IT workers who only migrate „digitally” to work in other places, to migrants who physically moved for longer or shorter periods of time abroad.

Contribution 1

The research carried out by Oltean and Taylor delves into the intersection of technology and migration, probing the shifts in highly skilled labor mobility and the intricate interplay between location and value creation. The research

focus centers on evaluating the impact of these evolutions specifically within the tech sector and the IT labor market in Cluj, Romania. The overarching goal is to comprehensively grasp how the fusion of the pandemic and ongoing labor mobility trends, in conjunction with value creation, has left an imprint on labor markets and the migration patterns of highly skilled workers. This paper emerges as a reflection of an ongoing fieldwork in Romania, emphasizing transnational entrepreneurship, the innovative networks that underpin social structures, and the multifaceted landscape of labor migration within the tech industry. It presents insights shedding light on the swift transformations that have reshaped the work dynamics in the post-pandemic era. Moreover, the paper delves into an analysis of the potential ramifications these evolving trends might have on the nature of migration dynamics and the intrinsic relationship between value generation and geographical location.

Contribution 2

This article works with the concept of "brain-gain" and "brain-loss" which hold significant implications for countries experiencing the departure of talents as well as those receiving such individuals. This phenomenon carries weighty consequences across social, economic, and political domains, prompting stakeholders to devise policies in response. As the Cepoi argues, while a substantial body of literature exists exploring the reasons behind societies witnessing "brain-loss" alongside the return of individuals to their homelands, there remains a dearth of research on the activities engaged in by the returning diaspora post-repatriation. More specifically, limited research has been conducted on how the returning diaspora influences regional innovation performance. Thus, this article proposes a novel theoretical and empirical framework aimed at comprehending the involvement of the returning diaspora in the innovation process and its subsequent impact on regional innovation performance. The innovation here lies in combining classical theories on returning diaspora, Regional Innovation Performance, and Social Fields Theory among other. This unique approach focuses on the convergence of three social forces—namely, institutions, networks, and cognitive frames—within the returning diaspora. The assessment of the

diaspora's influence on regional innovation performance primarily hinges on understanding and combining these two factors. However, it is important to note that this article primarily serves as a theoretical proposition, seeking to enhance understanding of the phenomenon and lay the groundwork for future systematic data collection. The empirical findings derived from this framework hold the potential to yield policy recommendations for various stakeholders, fostering improvements and encouragement for innovation activities within the region.

Contribution 3

While previous studies have extensively documented Romanian migrants in Italy and their future-plans, the unprecedented context shaped by the coronavirus pandemic has drastically impacted the spatial mobility of individuals which provided an interesting study case researched in Porumbescu's article. The constraints on free movement in Italy have been particularly stringent, especially if one considers the EU principle allowing European citizens the freedom to reside, work, or study in any Member State of their preference. Building upon this paradox, this contribution embarks on an exploration of the status of Romanian migrants employed in home caregiving services for elders in Italy, commonly known as "badanti." The research is framed within the context of temporary restrictions on freedom of movement and serves as a mean to enhance comprehension of migration patterns during crises and the decision-making processes therein. The study provides an overview of the general context of Romanian badanti in Italy and their experiences during the Covid crisis and it further centers on delving into the motives influencing the decision of individuals to either remain in Italy or return to Romania during the lockdown and subsequent restrictions. Several key factors seem to influence the decisions of migrant care workers, such as family ties, workplace dynamics, financial considerations, and intrinsic aspects including emotional responses to the situation. An overarching finding emerged from the interviews: women employed under formal contracts, married or with established families in Italy, and possessing longer tenures of employment were inclined to opt for remaining in Italy.

Conversely, Romanian caregivers with families residing in Romania showed a higher inclination to return, even for an indefinite period, particularly when engaged in informal work arrangements.

Contribution 4

This paper delves into the intersection of social trust and migration, investigating the intricate interplay between emigration from Romania, return migration, and various stakeholders. At its core, this research aims to address the fundamental question of how migration experience intertwines with social trust. Thus, Birou's contribution explores the impact of interactions with institutions, both in Romania and host countries, on the development/erosion of trust. Key elements considered in this analysis encompass the determinants and consequences of trust, life experience, degree of integration, and satisfaction with public institutions, which empirically explore the migration-social trust nexus. Drawing on insights from interviews conducted with Romanian emigrants and returnees, this study elucidates how the unique experiences of emigration and return significantly shape the of social trust observed within these groups.

Contribution 5

Baru's contribution examines the dynamic migratory process in Romania, specifically focusing on return migration from Norway and its potential sociocultural implications for Romanian migrants and their home communities. She highlights the challenges faced by Romanians in Norway and suggests that, over the long term, return migration could contribute to social and cultural changes in Romania. The research yielded three primary findings. First, Romanian returnees from Norway internalized changes during their migration experience, leading to changes in attitudes, behaviors, values, and expectations, which they subsequently disseminated within their family and social circles. Second, the prevalence of social remittances seemed to hinge on the motivation of returnees to impart their knowledge and practices for the sake of societal change. The reception and cultural diffusion of these transmitted resources within origin societies also played a significant

role in their prevalence. Third, despite Romania historically having an emigration-friendly stance, repatriated Romanians displayed confidence in their skills and expertise, thereby wielding influence over cultural aspects in work and social relationships upon their return.

Conclusion: avenues for further research

Migration is a complex and continually evolving phenomenon, drawing from established theories and concepts while also incorporating new approaches and perspectives. Particularly regarding return migration, especially within the CEE region, there is a wealth of evidence showcasing unconventional migration dynamics that challenge traditional ways of understanding it using frameworks like migration-development nexus. This evolving landscape presents numerous prospects for further research, as highlighted in the papers included in this special issue.

First, the research showcased in these papers use qualitative methods, primarily reliant on interviews conducted with participant groups of different sizes, usually relatively limited. A clear path for future research involves expanding these sample sizes, possibly delving into comparative frameworks or mixed-methods.

Second, I delve into Oltean and Taylor concept of ‘digital migration’ and explore the variations of this phenomenon in the CEE region. Unlike the more rigid notions of ‘staying/returning’ prevalent in earlier migration-pattern studies, the newer frameworks involving digital, temporary, circular, or onward migration offer a more adaptable and open-ended perspective on core notions like host/home community, identity, or belonging.

Third, I depart from Porumbescu and Baru’s research on migration – inequality nexus to suggests for deeper exploration of it, especially in the return migration context. The interplay between migration and inequality it is argued to be cyclical: migration emerges from inequality, and in turn, the process of migration creates new forms of inequality. Thus, this link between migration and inequality stands as a significant theme within migration studies that warrants comprehensive investigation from scholars.

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