

A Socio-Cultural Perspective on Migration and Economic Development: Middle Eastern Migration from Kerala, India*

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1. Introduction

More and more countries around the world are turning to short-term international migration to solve their labor shortage problems. By hiring a rolling stock of temporary and cheap international labor, countries save on social and educational expenditure and also solve the problem of keeping their culture intact. Labor-importing countries impose a variety of restrictions on international workers concerning the length of stay and the admittance of dependants. Thus, unskilled and semi-skilled workers in particular are only given contracts of a few years at a time and in most cases (through income and visa restrictions) family members are not permitted to join the migrant. Consequently, short-term migrants are oriented toward their home countries, visiting frequently and living frugally so that they can remit a large portion of their income to their families.

Since short-term international migration is generally undertaken for economic reasons and the most obvious effect of such migration on sending countries is the outflow of a significant proportion of the workforce and the inflow of large sums of money, most studies of such migration have tended to focus on its economic consequences. These studies, largely conducted by economists, have examined the use of remittances by migrants and their families. The hope was that these remittances would be invested in productive activity and thus would stimulate economic development. However, this hope has often not been realized since migrants seem more likely to spend their excess income on lavish hospitality, conspicuous consumption, and the building of large, showy houses.¹¹

This article argues that socio-cultural factors generally neglected by economists, such as the perception of income derived through foreign employment and differences in the ethnic structures of different migrant

¹ See for instance Amjad (1989), Appleyard (1989), Arnold and Shah (1989), Gunatilleke (1986), Nair (1986), Papademetriou and Martin (1991), Stinner (1982), and Watson (1975).

communities, profoundly shape the use of such income and should be taken into account by policymakers interested in enhancing the development potential of migrant remittances. As a case study, I examine the use of remittances in three villages in Kerala, India which had a large-scale migration to countries around the Persian Gulf. The patterns of consumption, investment and exchange were distinctly different in the three areas – Veni, Cherur, and Kembu – since the socio-cultural structures of the communities were very different.²² Although community differences in migration patterns were widely recognized by the migrants themselves (see for instance Osella and Osella 2000, 7-8), I will show that these differences were missed even by the local economists who studied the phenomenon, resulting in misleading conclusions and unviable policy directives.

2. Background to the Gulf Migration from Kerala

Beginning with the dramatic increase in oil prices in the early 1970s, there has been a large out-migration from Asian countries (particularly India and Pakistan) to the Middle East. Persian Gulf countries undertook a massive infrastructural reconstruction, and in a relatively short period of time were able to transform themselves from semi-nomadic societies to some of the most technologically advanced nations of the world. Foreign labor was central to this transformation. By 1980, 69.8 percent of the workforce in the region were foreigners. In some countries, like the United Arab Emirates (U.A.E.), the percentage was as high as 82.5 (Owen 1985:18).

While most of the imported labor consisted of unskilled and semiskilled workers, given a very small and (at the time) relatively uneducated and unqualified population in the region, there was also a need for a variety of other types of migrant skills. There were opportunities for some entrepreneurial activities and clerical workers of different types. Hospital staff from orderlies to laboratory technicians, nurses, doctors, and administrators were in great demand. Engineers were needed to design and execute the many projects that were being undertaken.

Kerala is a small state in South India which has been a major labor exporter to the Middle East. Although the state's population of around thirty million in 1990 comprised only 3.43 percent of the population of the country (Prakash 1994:43), 35 to 50 percent of the migrants from India were from this state (Gulati and Modi 1983:58; Nair 1989:343; Prakash 1998). A statewide survey conducted in 1992-1993 found that 23 percent

²² The names of the three villages are pseudonyms, to protect the identity of the communities and the individuals studied.

of households reported having at least one member who had worked outside the country at one time or another. Another survey conducted in 1998 estimated that there were thirty-three international migrants for every one hundred households (Zachariah et al. 1999, 4). Ninety-six percent of these international migrants were probably in the Middle East (Banerjee et al. 1997, 3). My research showed that the proportion of households with migrants was much higher in the high-migrant areas, known locally as “Gulf pockets.” In these areas, around 60 to 90 percent of households had participated in the migration at one time or another.

Data from survey studies of the Gulf migrants in Kerala (Government of Kerala 1987; Gulati and Mody 1983; Banerjee et al. 1997; Zachariah et al. 1999, 2000) indicate that they were overwhelmingly male (92.5 percent), young (half were twenty-five years or younger), married (81 percent), poorly educated (70 percent had less than ten years of education), and unskilled (73 percent). The average length of stay in the Middle East was around seven years (Zachariah et al. 1999, 12).

Estimates of remittances to Kerala from the Middle East are difficult to obtain, with the figures varying from five billion rupees per year in the 1975–1986 period (Nair 1987, 20), to between 7.3 billion to 9.2 billion rupees for 1980–1981 (ESCAP 1987, 81), to 10.14 billion rupees for 1987–1988 (Nair, 1996). These remittances contributed a whopping 22 to 28 percent of the state domestic product in 1980–1981 (ESCAP 1987, 81). It is estimated that remittances contributed up to 50 percent of the gross domestic product of the high migrant districts (ESCAP 1987, 74).

B.A. Prakash (1998) argues that since the 1970s, “the factor which had the greatest impact on [the] regional economy, especially on [the] labor market, consumption, savings, investment, poverty, income distribution, and economic growth, has been the Gulf migration and migrant remittances.” Studies of the economic impact of the migration point out that the migration has had a positive economic effect on poorer households and has reduced income inequality in the state since most of the migrants were unskilled workers from lower income backgrounds (Nair 1989, 356; Zachariah et al. 2000, 29). The authors of the Kerala Migration Study conducted in the late 1990s similarly concluded that despite some negative effects (such as the stagnation of the agricultural and industrial sectors, and the skyrocketing increase in wage rates and land prices) on balance, the effect of migration had been positive and that the Gulf migration should therefore be viewed as “an unconventional path to development” for Kerala (Zachariah et al. 2000, 46).

Due to the scale and significance of the migration, the high-migrant areas in Kerala (and to a lesser extent, the state as a whole) experienced a process of rapid economic and social transformation and thus provide excellent case studies of migration-induced development. Three such case studies are discussed in this chapter. After a brief overview of the sociological perspective on remittances and economic behavior, I discuss some cross-cultural similarities in the use of remittances obtained through international migration in the next section. I argue that it is due to the social meaning attributed to such income that we see some broad patterns in the economic behavior of international migrants. In many cultures, income that is earned as a consequence of international migration is perceived as being fundamentally different from income earned through local work. Within this larger pattern there are significant local variations in the ways in which the remittances are used for consumption and investment, specifically in the number and range of people who benefit from the remittances, and the type of income-generating activities that migrant families from different communities engage in. These variations are illustrated by the three case studies from Kerala. The final section of the chapter discusses the relationship between socio-cultural and economic aspects of migration and its implications for developmental policy.

3. The Social Meaning of International Remittances

While economists assume that economic behavior is undertaken for utilitarian reasons, sociologists argue that it is important to understand that economic activities are also expressive and symbolic in addition to being purely utilitarian. As Paul DiMaggio (1991, 131) points out, economic goods are also “cultural goods,” “consumed for what they say about their consumers to themselves and to others as inputs into the production of social relations and identities.” Other scholars have argued that money and wealth have cultural and social meanings and can therefore be viewed differently in different contexts. To illustrate the inadequacy of a purely utilitarian conception of money, Viviana Zelizer points out that “not all dollars are equal.” “Money is... routinely differentiated, not just by varying quantities but also by its special diverse qualities. We assign different meanings and designate separate uses for particular kinds of monies.” She gives as examples the way we differentiate a housewife’s pin money or allowance from a salary, a lottery winning from an ordinary paycheck, an accident compensation from book royalties (Zelizer 1989, 343). Thus Zelizer makes the case that the meaning that is attributed to income and the use to which it is put depends on the context within which the money is obtained.

Drawing on these perspectives, I argue that the “unproductive” use of international remittances on conspicuous consumption that we find among migrants from a range of countries and cultures is due to the social meanings attributed to such income. The literature on international migration as well as my own observations of the behavior of Gulf migrants in Kerala and the expectations of their community members seem to indicate that the money earned as a result of working abroad (particularly in the case of lower-class rural migrants going to a more developed country) was seen as being of a different kind from income that was earned locally. Thus, I noticed that the economic behavior and consumption patterns of non-migrants (even those earning an equivalent amount of money), especially in villages where there was little or no migration, was invariably different from those of the migrants that I studied.

The reasons for this phenomenon are complex and, while I suggest some of them here, I make no claim to present an exhaustive or even a comprehensive explanation. At the outset, I must make clear that I am referring to situations in which the migrant is part of an organic community. Such communities are generally characterized by some degree of mutual bonds as well as the obligation of reciprocity. In fact, as the material will demonstrate, the extent to which conspicuous consumption is manifested is often a function of the cohesiveness of the community in question. Different economic patterns are manifested depending on the nature of the social bonds between community members.

Probably the most important attribute of international remittances is that migrant incomes are generally much higher than the amount that would have been earned in a comparable local job. Due to the higher level of technology in the foreign country, those at home perceive the work undertaken by migrants as being less physically arduous. In addition, they also feel that there are the additional compensations gained from the glamour and experiences of life in a foreign (and developed) country. For all of these reasons, foreign income is seen to be serendipitous, “easy money,” which is not fully earned. As such, community members expect that the money will also be disbursed more freely. In other words, it is seen to have some qualities of windfall income. Zelizer (1989, 350) points out that such income is treated very differently from identical sums obtained through other means. An example will make this clear. A young, fashionably dressed Gulf migrant at home on holiday boasted to me:

When I am here, I spend an awful lot of money. Just yesterday, I took out Rs. 1,200 from the bank and see [pulling out the money from his pocket], now I have only Rs. 400 left. I don't

know where the rest went. Someone comes and asks me for money and I give it to him. And when I go to buy something, fish, for instance, even if I need only ten rupees worth, I spend fifty or seventy-five rupees, because otherwise, what will they think – a Gulfan being so miserly. Yes, people generally increase prices when they see us. And they know we don't like to haggle.

Typically, earning money easily and spending it freely are characteristic of the lifestyle of the upper classes who, because of their affluence, are obliged to act as patrons for the poorer and less-fortunate villagers. This in turn secures them status and a following. Status is a value that takes on the greatest significance in a cohesive community. It has to be conferred and recognized by a group, and this is most successfully accomplished in situations where there is a great deal of face-to-face interaction. Largesse may also be distributed to counteract the possibly harmful effects of envious neighbors and relatives. All of these social pressures work to prevent migrants from spending their remittances solely on themselves and their immediate families; individual acquisitive behavior is constrained by community demands that stress the importance of sharing some of the wealth with fellow members.

Thus, I suggest that economically successful returned migrants from small, rural communities spend their money conspicuously to indicate that it has been earned easily (which is prestigious), and are also lavish in their generosity to fellow villagers as well as to village causes so that they will be able to secure community goodwill and a higher social standing. Both conspicuous consumption and conspicuous generosity involve pronounced changes in the lifestyles of the migrants. The building of a large and showy house is also of high priority since it is the most visible indicator of the change in status of the family and will stand as a permanent emblem of their success. Migrants proudly display consumer durables brought from the foreign country for the same reason. Since material affluence has come to have virtually universal appeal, it is not surprising that these patterns are manifested by migrants around the world.

Migrants, by introducing these new patterns of material and social living, are also cultural entrepreneurs of the society. Since the migrant has been exposed to a more developed society, he or she is regarded as being worldly-wise and thus legitimacy is accorded to the use of the money earned in this manner to effect changes in the migrant household and in the society at large. These changes spread in the society through the "contagion effect." Even migrants who are not able to earn much as a consequence of the

migration tend to imitate the behavior of the wealthier returnees so that they can also secure a higher status. Non-migrants, for their part, try their best to keep up.

These are some of the elements of the complicated interplay of factors that take place in rural communities which experience a large-scale temporary migration of predominantly lower-income migrants. In addition, arrangements to send and receive the remittances have to be made by the migrant households, and control over local economic transactions and decisions (which the male migrant would generally have exercised had he been locally resident) has to be transferred to another person. There are thus several common processes that migrant households and migrant communities undergo.

Differences in these common processes result from modifications which are structured to fit the social and “cultural matrix” in which the community is situated (Parry and Bloch 1989). Veni, Cherur, and Kembu were part of the *Mappila* (Keralite Muslim), *Ezhava* (lower-caste Keralite Hindu), and *Syrian Christian* (upper-caste Keralite Christian) communities respectively. In addition to the fact that the emigrant communities in question practiced three different religions, there were other fundamental differences of social structure and culture. Thus they differed in family and community structure, inheritance systems, gender roles, occupations, economic position, and educational attainments, to name only the most salient of factors. It is due to these multidimensional differences between the communities that I define them as “ethnic” groups (see Kurien 2002). My argument in this article is that the large scale migration to the Middle East of lower-class migrants and their rapid enrichment brought about a reconstruction of the ethnic identities of the three communities. Economic choices are an important way in which personal and group identities are expressed and I will demonstrate how the patterns of consumption, investment, and exchange undertaken by the groups as a consequence of migration manifested as well as shaped their ethnic structures and identities.

4. The Three Economic Patterns

In this section, the three communities, each in a different geographical region and “Gulf pocket” of Kerala, are described and the patterns of migration from them and the manner in which the remittances from the Gulf have been used by each are discussed. As mentioned above, there were some broad similarities in the expenditure patterns of the areas. In all cases, for example, house construction was undertaken and migrants brought back electronic consumer durables and clothing from the Middle

East on each return trip. In the following pages, however, the focus will be on the major differences in the consumption, investment, and exchange behavior of the three villages. Briefly, in the Mappila Muslim village, a great deal of emphasis was given to distributing remittances to the largest circle of people within the community and to supporting religious activities. The Ezhava Hindus spent large sums of money on elaborations of life-cycle rituals during which there was lavish gift-giving and entertaining. Thus, there was a smaller circle of exchange than in the Mappila village. In the Syrian Christian village, the gains of migration were largely confined to the immediate family. Some amount went to religious causes, but for the most part the emphasis was on saving the money earned, to be used later for dowries for daughters and for professional education for sons. The major forms of economic investment in the three communities varied also, from business activities in the Mappila Muslim community, to usurious lending in the Ezhava Hindu village, to fixed deposits and bonds in the Syrian Christian locality.

The primary fieldwork was conducted over a nineteen-month period, between June 1989 and December 1990. I lived in or near each of the three villages for between three and five months during my period of fieldwork. I made two subsequent trips to southern India in 1993 and 1997 and maintained sporadic correspondence with scholars and residents in Kerala to keep up with the consequences of migration in the state. My aim while conducting fieldwork was to have data of three kinds: community-level information, general household-level information, and case studies of representative households of different types such as long-term, short-term, and returned-migrant as well as non-migrant households. As far as possible, I collected these data for the major classes and castes in the three areas. I had a detailed schedule of questions for both community-level and household-level information. I used that as a guide, but the focus and the way I asked the questions varied, depending on the situation and the response of the people. I talked to a range of people – women and men – in the village and panchayat offices, travel agencies, banks, schools and pre-schools, shops, hospitals, and police stations, in addition to the women, men, and adolescents that I met in the different households. During my stay in the three villages, I visited a total of 276 households, some for only a few minutes, others for several long visits, but due to a variety of circumstances, a proper survey study was not possible. Thus, the information collected through my house visits was more in the form of descriptive case material than tabulatable statistics. Instead of tabulations, I noted recurring themes in the accounts and collapsed them into ideal type descriptions of the areas.

What is presented below is therefore not a description of the communities based on averages, but instead is an accentuation of the distinguishing features of the areas.

4.1 Veni: Wage Laborers, Charity, and Muslim Community Solidarity

A predominantly Muslim village in a Muslim-majority district of northern Kerala, Veni was an area that had come under the direct control of the British and suffered a great deal under the colonial regime. The economic impoverishment and political harassment that the Mappilas of this area experienced during this period caused them to turn inward, rejecting “Western” culture and institutions such as secular education, modern medicine, and the bureaucracy which were identified with the British. This also led to the development of a tightly knit community with a strong corporate identity, a high degree of group solidarity, and relative social egalitarianism. The village as a whole had low levels of education. Joint family households were prevalent and fertility rates high. The family structure was patrilineal, patrilocal, and strongly patriarchal. Though the seclusion of women and their early marriage were ideals, this was practiced mainly by the wealthy; among the lower classes women had to go out for agricultural work. Before the large-scale migration to the Middle East, the primary economic activity in the village was agriculture and the wholesale trade of agricultural commodities. With the exception of a few large farmers and some business people, most villagers were very poor.

Poverty and political oppression forced many of the young men in the village to migrate to other parts of the country in search of employment. Their low education and social marginality meant that they had to take up unskilled and semi-skilled jobs. The ethnic networks that were built up facilitated the continuing migration of the villagers into such occupations. The villagers from Veni specialized largely in hotel and bakery work. A few managed to work their way up, to become the managers or owners of these concerns. The typical pattern was that the men would leave their families behind in the care of their parents or relatives.

Trade relations between this region and the Middle East were centuries old, and in fact the local Muslim population was a product of the conversions and intermarriages made by Arab traders. Their common heritage and Islamic identity meant that the Mappilas had a special relationship with the Arab traders. News of work opportunities in the Gulf spread through this source, and most of the early migration (which began in the mid

1950s) occurred with the Mappilas taking illegal passage on the merchant launches of the Arabs. One might speculate that the Islamic bond and their migratory tradition were the factors that led the Mappilas of Veni to take the risk of going to an unknown country.

Once they arrived, their lack of education and the illegal nature of their entry into the society meant that most Mappila migrants obtained jobs in the informal sector. The largest proportion of migrants from Veni (around 60 percent) performed unskilled work, about 15 percent were in domestic work and about the same number were in “business” which ranged from petty pavement trade to the management or ownership of big supermarkets and stores.³³ Many worked illegally, without formal contracts. Some did odd jobs or filled in temporarily for other workers. Most had more than one job at a time.

Ethnic networks were even more crucial in the Middle East since they created community enclaves within the country which helped support temporarily unemployed migrants, and made it possible for newcomers to take the risk of migrating even without having prearranged jobs. Most of the migration from Veni took place as a result of relatives or friends using their contacts with Arabs to arrange for jobs and visas for the prospective migrant.

The manner in which the migrants organized the process of sending back money bore the distinctive stamp of the social matrix within which they were operating. Villagers from Veni tended to join a “chitty” group (usually comprised of other Mappilas) soon after getting a job in the Gulf. Every month the members would contribute a certain amount into the chit fund, and each month one person in the group got a large sum of money (worth twelve- to eighteen-months’ contribution). The chitty was thus a means of pooling money so that the person who was going back home for a visit could mobilize the large sum of money he needed. This depended almost entirely on the trust between the members of the chitty group since there was no security, and the whole system would have collapsed had even a few members defaulted.

A large part of the money earned by the villagers was sent back as “tube money.” This was money that was converted at the higher black market

³³ These figures are approximations and are based on information given to me by travel agents and local political figures. According to the 1980 Survey of Unemployment and Housing, of the 2,340 migrants from Veni at the time, 1,367 of whom had gone to Gulf countries, 11 percent were skilled workers, 86 percent were unskilled, 2.6 percent were technical workers, and a mere 0.3 percent were professionals (Government of Kerala 1982).

rate of exchange and was thus sent through illegal channels. Smuggling of gold and electronic items from the Middle East to Veni was also common. In fact, the village was a known center for such illegal activities. Both “tubing” money and smuggling depended fundamentally on having a good, safe, and widespread network and having the know-how and the contacts to conduct the transactions. If money was not sent through the “tube,” migrants from Veni preferred to send it directly through friends returning to the area so that they did not have to pay the remittance charges (i.e., of the bank draft). Each migrant came back home only once in two or three years, but because of the ethnic network, he could send and receive most of his letters and gifts through friends who were visiting home (thus saving the expense of postage).

There are several reasons for the remittance patterns adopted by the migrants from Veni. First, the relatively low income earned by the villagers meant that they could support their families only by using the black market rates of exchange or by smuggling in a little gold (or some other item) each time. What is more, the non-formal and non-legal types of occupations that they took up in the Middle East made it impossible for them to use the official channels for remittances since these were recorded and scrutinized by tax officials. In addition to these economic reasons, social factors such as the cohesiveness, solidarity, and trust between the members of the community were probably as important in the choice of these channels of transmission. The minority consciousness of the group could also have played a role by increasing their proclivity for non-formal and unofficial routes.

Due to the solidarity and tight-knit character of the community, together with the fact that the villagers of Veni saw their identity as Mappila Muslims as involving a major emphasis on the giving of charity, a lot of the Gulf money was spent on gifts to relatives, friends, and community members. In Veni, a major source of status was being in the position of a donor and thus many migrants helped the poor in a variety of ways. As a wealthy migrant put it:

I, my father and his father before him have until recently had to depend on the big people in the area – for a job, for medical emergencies, for weddings and funerals. With Allah’s blessings, I have been fortunate enough to become a person that other people depend on.

I was told (by both the poor and the rich) that a poor person had only to write to a Gulf migrant from his area if he had any major or unexpected expenses to meet. It was a matter of honor for the migrant to respond to

such a request. In addition, there were local committees for each area, usually organized by the local mosque to take care of the poor. The local community also felt a sense of responsibility for widows and orphans without any relatives to help them. I gathered that there were four main ways in which help was rendered. Money was given to help poor families build a “pucca” (concrete) house, to provide a dowry to get a girl married, and to support the local orphanage.⁴⁴ Finally, migrant households provided food to poor families and clothes when the migrant returned from the Gulf. A good deal of money also went to the support of the local mosques and to the schools and colleges imparting religious training.

The value placed on the purity and seclusion of women manifested itself in several ways in the expenditure patterns of the area. Thus, dowry rates had registered a tremendous increase and marriages were arranged when the couple, particularly the girl, was younger. A good deal of money was also spent on transportation, particularly on taxis, since it was considered a more decorous and prestigious way for women to travel (as compared to walking or taking the bus).

In Veni, unlike in the other two communities, very little of the Gulf money was spent on education. As a consequence of the migration, there was an increasing emphasis on the necessity for schooling, particularly at the primary and secondary levels, but compared to the other two areas the villagers spent little on education. This was undoubtedly related to the general under-emphasis on education in the area. The Gulf migration, by enriching relatively uneducated people, acted to reinforce this tendency.

A strong business orientation was another distinguishing characteristic of this community and thus one of the main targets of investment in Veni was business. The central market area had developed rapidly as a consequence of the migration, and at the time of my fieldwork, Veni had the look of a small town rather than a village. Besides shops of all kinds (the main market area was around half a mile long and had shops on both sides of the road), it also had twelve travel agencies, thirty-six gold jewellery shops, four video libraries, and dozens of small department stores. There were also over a hundred commercial vehicles of different kinds – jeeps, taxis, vans, and three-wheelers. The reasons for this development are many. The main factor was probably the prior involvement of the community in trade and the fact that the village had been a trading center in the past. Investing money in business was also the easiest means of laundering black money,

⁴ There were six orphanage subcommittees in different countries in the Gulf to collect money for the institution.

which was an important consideration in an area that specialized in such activities. Smuggling in a few gold biscuits on each return visit was a common way for migrants to make some extra money. This, together with the fact that a large proportion of the dowry was in the form of gold, could also account for the big increase in the number of jewelry shops. The high level of solidarity and trust of the community would also lead them to prefer to do their business with fellow villagers rather than outsiders (an untrustworthy goldsmith could keep some of the gold for himself). Since women were not allowed to go out, most of the daily shopping in the Gulf households was done by the children of the house. It was therefore necessary to have the basic provision shops nearby, which probably accounted for the tremendous number and spread of shops selling vegetables, rice, sugar, lentils, oils, and spices. The increase in the number of taxis was due to the value placed on women's seclusion and the growing number of "feasts" and family get-togethers that were being organized.

An important social consequence of the remittances was their effect on the power structure of the household and community. Given the patriarchal extended family household in Veni and the position of women, remittances were almost always sent to a male relative or friend. Thus, younger women were even more excluded from economic control than they would have been if their husbands had been living with them. The fact that relatives and even friends were entrusted with the task of receiving the money and making the economic decisions for the household can also be seen as an indication of the mutual trust and dependency of community members.

4.2 Cherur: Technicians, Conspicuous Consumption and Social Mobility within the Hindu Caste Hierarchy

This was a Hindu village in south Kerala. It was the Ezhavas, a lower caste, who were the main migrant group in this region. In the pre-migration period, the Ezhavas were the tenants and laborers of the higher castes. The higher castes had an extended family system that hinged on the impartibility of the ancestral lands and that therefore restricted the mobility of individual members, but the Ezhavas had a more flexible family structure. Formerly matrilineal and matrilocal, many of these features continued into the present despite a shift to a bilateral system. It was probably the combination of a flexible family structure and tenuous links to the land, together with the social awakening experienced by the caste (as a result of reform movements), which created a desire for status improvement, that was responsible for the Ezhavas taking the lead in overseas migration from this region.

The first migration from the area began between 1930 and 1945.⁵⁵ The migrants went to Malaysia and Singapore; like the Muslims, all the migrants were male and almost all of them went alone, leaving their families behind. Due to the matrilineal inheritance, wives generally stayed in their own villages and were looked after by their parents and brothers. The migrants took up technicians' jobs in Singapore and Malaysia – most of the migrants from Cherur were drivers of heavy vehicles or car mechanics. Because of the time and cost involved in the long journey by ship, the men would come back very infrequently – usually only once in five to six years.

The Gulf migration from Cherur started in the 1970s, after job opportunities in Singapore and Malaysia had been exhausted. For most of the reasons already mentioned, together with the prior migratory experience, it was mainly the Ezhavas who went to the Middle East. Again, the Cherur villagers went mainly as technicians – most of the migrants from Cherur worked as mechanics, electricians, plumbers, and masons. Since the villagers from Cherur obtained more formalized contractual occupations in the Gulf, they did not have the additional sources of income that many of the migrants from Veni had.

Although the Ezhavas in Cherur had a sense of being part of a corporate group, this “ethnic” awareness did not translate into a fulcrum of solidarity. It was more of a negative identity; they had a low degree of group solidarity and a great deal of intra-group competition and conflict. Here again, ethnic networks played a role, but due to their relative lack of cohesiveness, they took a different form than in the case of the Mappilas. Most of the migrants from this area went to the Middle East through professional job agents (to whom they had to pay a hefty fee). Since there were thousands of such agents of varying degrees of reliability, the ethnic networks helped to disseminate information about which agents were most trustworthy. Some members of the community also used their position in the Middle East to act as agents for their community members. This did not reduce the amount charged, however. In general, if the migrant was not an immediate relative, the community member had to pay as much as he would have paid the most expensive agent.

There were a few cases of “tube money,” but this was not common. In general, the migrant would keep some money back for personal expenses and the next trip home, and would send back the rest of the money at regular intervals in the form of a postal draft. In the early period of migration,

⁵ This period, during the Great Depression and the Second World War, was one of great hardship in Kerala.

some migrants had started chitties, but due to defaulting by members this had collapsed.

The major items of expenditure in this area were the life-cycle rituals and festivals that constitute an important part of the social and religious life of a Hindu community. Conventionally, when a lower caste became affluent or powerful, a process of caste mobility was initiated whereby the style of life, customs, and rituals of a higher caste were adopted. Generally such changes were followed by a claim to a higher position in the caste hierarchy. This process has been called *Sanskritization* (Srinivas 1968). While the Ezhavas of Cherur had adopted new occupations as well as new rituals and ceremonies, I have argued elsewhere that these did not conform to the typical Sanskritization pattern since they were not the ones practiced by the upper castes of the area (Kurien 2002). What is of relevance in the context of their economic behavior, however, is the fact that life-cycle ceremonies had been elaborated, and several new rites of gift-giving (largely of gold) had been introduced. The ceremonies were also conducted on a far more lavish scale than earlier. Marriages were the biggest of such celebrations and migrants spent a good proportion of their Gulf money on the weddings of their sisters, daughters, and close relatives. Life-cycle ceremonies and festivals were also occasions when the members of the community were expected to give fairly substantial gifts. Thus, Gulf money had created a circle of reciprocity and redistribution within the community in Cherur, though this was much smaller than in Veni.

Education was another major item of expenditure. Although the state as a whole had traditionally placed a lot of emphasis on education, as low castes the Ezhavas had not been allowed to attend government schools and colleges in the earlier period. Investing in education was therefore another means that the Ezhavas used to achieve a change in status. Many of the children were sent to the relatively expensive English medium schools, and money was also spent on various coaching classes to make sure the children obtained good results.

There were very few shops in the area and most villagers took the bus to the nearest town (around six miles away) to do their shopping, but there was still very little investment of the money in local business. The few people who tried wound up with big losses. The villagers implied that this was due to the lack of a business tradition and culture, and the competitive nature of the community which did not support local entrepreneurial activity.⁶⁶

⁶⁶ I was told that many people preferred to go to the town for their purchases rather than give their business to a fellow villager. They also felt that the goods sold locally were inferior to and more

The main manner in which Gulf migrants “invested” their money was in usurious lending to other community members. Such loans were given out at much higher rates of interest than charged by banks.⁷ These rates were charged even to relatives, something which would have been shocking in both Veni and Kembu. Here again, a few members had defaulted in the last few years and so some of the Gulf money was now being deposited in banks.

Even though the inheritance system had become formally bilateral in that both sons and daughters were to get an equal share, in practice daughters still continued to be favored, particularly among poorer families with too little property to divide among all the children. As I was told several times: “Because of this father–daughter flow, men are scared to entrust their own fathers with the money for a house, fearing that it would go to their sisters instead.” For this reason, the Gulf migrants often sent their money, particularly the larger amounts intended for the purchase of property or a house, to their fathers-in-law, who would look after the financial dealings on behalf of their daughters. The regular remittances were usually sent to wives, who would use a portion for the household expenditure and would lend out the rest. Thus, the position of women and their families was generally strengthened as a result of the migration.

4.3 Kembu: Professionals, Nuclear Family Enrichment, and Individualism within a Christian Community

This was a largely Christian village in central Kerala. In the pre-migration period the primary economic activity here as in Veni and Cherur was agriculture. During the second half of the colonial period, Kembu became a center for several missionary orders, and the missionaries founded hospitals and schools in and around the village. Pleased to have local allies, they accorded special favors to the native Christians (Syrian Christian communities)⁸ and encouraged their education and employment in such institutions. As a consequence, despite the poverty of the area, a lot of emphasis was placed on getting a good education. Since there were no English medium colleges in the area for a long time and English education was highly regarded, many would go to faraway cities outside Kerala for the sake of higher education, and families would make a lot of sacrifices to put their children through college.

expensive than what was obtainable in the town.

⁷ Villagers were still more likely to use this source for loans since banks required collateral which few locals could produce.

⁸ Syrian Christian communities in Kerala long antedated Western colonialism and missionary activity and were the product of trade contacts between Kerala and the Middle East.

The extended family constituted a corporate unit and, though the households were often nuclear, they were situated adjacent to each other on the family property. The family structure here too, as in the Muslim case, was patrilineal and patriarchal, but women in the community were also well educated, and a significant minority even obtained jobs, mainly as teachers and nurses in the mission institutions. This was a highly religious community and affiliation to a church denomination formed a strong bond between members. The local church tradition placed a great deal of emphasis on saving and household budgeting (in fact the churches themselves organized chitties). Thus it was the Syrian Christians who were instrumental in starting the first banks and joint stock companies in the state. As a high-status minority community, the Syrian Christians had a strong sense of ethnic identity and exclusiveness, which led to a certain feeling of mutual obligation.

The tradition of young people migrating to cities for education and subsequently finding jobs there and staying on, or going to another city in search of jobs, was established quite early in Kambu. Since the nuclear household pattern was prevalent, the immediate family also settled in the city. The villagers from Kambu responded very early to the opportunities in the Middle East, with migration from the area beginning as early as the 1930s when the first Western oil companies began oil exploration in the region. Their English education and British contacts helped them to learn about the job prospects at this early stage and also to get well-paying white collar positions. The first migrants were technical engineers, clerical workers, and a few doctors and lawyers. Soon nurses came to be in big demand. The jobs were well paid and accommodation was generally provided, and since many of the wives were also able to find jobs there most of the migrants were able to take their families with them to the Gulf. Contracts for such workers were also longer term and were generally automatically renewed until they were ready to retire. Most of the early migrants were directly invited by the companies or their representatives, which meant that they did not have to go through agents. Even their air-fares were paid for by the companies. Later migrants went with the help of relatives who were well placed enough to secure them semiprofessional or white-collar positions without much difficulty. Thus, almost no one in this area had to turn to professional job agents.

Since most of the migrants from this area had their families with them in the Middle East, most of the money earned was deposited in banks there and only transferred back to Kambu around once a year in large amounts. Even when the family was left behind, they usually had some local sources of income such as agriculture or the salary of the wife, if she was working.

Thus there was less dependence on remittances for routine expenses. For this reason again, the money was sent in larger amounts at infrequent intervals. The migrant's wife took care of all the local economic transactions and decisions, and the money was almost always sent directly to her. As a result, migration enhanced the financial independence and autonomy of the women of the area. Even more important for the status of women was the fact that nurses from the area were often the primary migrants.

According to local bank officials, the villagers in Kembu manifested income maximizing behavior and a shrewd awareness of exchange fluctuations. Money was transferred directly to the local banks at optimal rates and was then distributed in securities and shares in such a way as to obtain the highest returns. The high level of education of the villagers, together with their tradition of employment in the banking sector in the Middle East and Kerala, allowed such information to be available as part of the ethnic resource of the community at large. Most of the remittances earned by the community were invested in financial instruments.

In general, the tradition of familial migration that had been created in the community had resulted in the loosening of community bonds and the development of a greater individualistic ethos. Because of this, and the general affluence of the community as a whole, there was very little reciprocatory or redistributionary activity in this area. Remittances were mainly used for the needs of the immediate family. A certain amount would be sent to parents and younger siblings but even this was not generally needed. Unlike the other two communities, in Kembu there was little or no gift-giving on return.⁹ Some money and gifts from abroad would be given to the families of house servants and to the poor people in the neighborhood who generally approached the migrant. Thank offerings and donations were also made to the church.

In viewing the expenditure patterns of the area as a whole, the first point to be noted is that, since income levels of this area were much higher than those of the other two villages, even the relative proportions of expenditure were likely to be very different. In general, the largest items of expenditure were education (huge donations were given to secure seats in professional colleges) and dowries (big dowries secured highly educated sons-in-law). However, and again unlike the other two communities, a good proportion of the income earned was invested in bank deposits and property. Having a large inheritance to pass on to one's children was an important value in this area. A lot of the local gossip consisted of attempts to speculate how

⁹ Even wedding gifts were not large unless it was for a close relative.

much individuals had “locked up in the bank” based on stray remarks made by the person, by friends, or by bank employees. Status in this community accrued from having a large bank balance, professionally educated family members and from being a devout Christian. The pastors of the area, however, remarked wryly that the material prosperity of the villagers had “often led them to turn away from God.”

5. Ethnicity and Economic Behavior

In the first part of this article, I pointed out that while the three groups were religiously different, the ethnicity of the communities was comprised of a much larger and more complex nexus of factors such as income, occupation, education, and family structure in addition to religion. This unique ethnic constellation of social variables conditioned the three different responses to the migration that the communities manifested and as a result, economic “development” meant something quite different in Veni, Cherur, and Kembu. At the same time, the economic affluence brought about by migration resulted in a reformulation of ethnicity in each of the three areas. In other words, there was a dialectical relationship between the economic and the socio-cultural spheres of community life.

As I have indicated, the Middle Eastern region offered a range of possible occupations for which migrant skills were needed, but the migrants from each of the three communities were “tracked” into different economic niches. Thus, migrants from Veni obtained jobs in the non-formal sector, those from Cherur took up formal contractual positions as technicians, while clerical workers and semiprofessionals dominated the outflow from Kembu. In every case the organization of the migration and remittance process was also distinct and a clear reflection of the cultural ethos and the social structure of the community. While ethnic networks were crucial to both the organization of migration and the remittance process, as I have shown in the previous section, they were used in different ways by each community.

With respect to the economic impact of the migration, while there was a pronounced change of lifestyles marked by cultural entrepreneurship, status spending, and public generosity in each village, the relative balance between these factors varied as did the specific income generating activities into which the savings were channeled. Economic control was also passed to different sets of individuals in the three cases. In Veni, a great deal of emphasis was given to distributing money earned to the largest circle of people within the community and to supporting religious activities. In Cherur, the money was largely used for the elaborations of life-cycle

rituals during which there was lavish gift-giving and entertaining. Thus, there was a smaller circle of exchange than in Veni. Money was also spent for education. In Kembu, on the other hand, the gains of migration were largely confined to the immediate family; some went to religious causes, but for the most part the emphasis was on spending the money on education and on saving the money earned. Again, the major forms of investment in the three communities varied, from business activities in Veni, to usury in Cherur, to fixed deposits and bonds in Kembu. The changes in the economic locus of control necessitated by the migration resulted in the strengthening of patrilinearity and patriarchy in Veni, the revitalization of female inheritance and matrilineality in Cherur, and the nuclearization of households as well as the empowerment of women in Kembu.

In each of the three cases, we can examine the social reasons for the divergent patterns of economic behavior and also show how the tension between individual acquisition and community demands was managed. In Veni, the Mappilas as an oppressed minority and a marginalized group emphasized the maintenance of the solidarity of the community.¹⁰ Both the migration process, with its heavy dependence on community members for information, visas, and sustenance in the Middle East, and the remittance process, which created and strengthened widespread networks, had the effect of fostering ethnic unity. Gulf money also contributed by increasing the number and range of people who were involved in exchange and dependency relationships, and by creating new religious institutions in the community. Their identity as fellow Mappila Muslims was constantly used to stress the necessity for charity, brotherhood, and equality. The emphasis on the purity, seclusion, and subordination of women was another value of the social order; here again, the newly earned affluence permitted its implementation by making possible the withdrawal of women from the labor force, earlier marriages, the use of taxis (with tinted windows) for transportation, and the rise of a wide network of provision shops.

In Cherur, the most encompassing value of the social order appeared to be the need to improve the social status of the Ezhava community. There was some tension between individual and community needs, since the route to success was to distinguish oneself as “successful” by a competitive display of wealth and a stress on education, both of which emphasized achieved qualities over the ascribed status of community membership. The practice of community members acting as “agents” and the use of Gulf money for usury had the effect of individual villagers enriching themselves at the expense of others in the community. However, even here generosity and

¹⁰ See Portes and Sensenbrenner (1993) on the conditions under which ethnic solidarity emerges.

redistribution were enforced through the emphasis given to gift exchanges within the circle of relatives and neighbors. Unlike the Mappilas, however, for whom gift-giving was generally a one-way relationship between the migrant and poorer non-migrants, reciprocity was stressed in Cherur. In addition, exchange relationships were limited to the particular caste members. The matrilineal principle, which was the distinguishing feature of this community, reemerged as a consequence of the migration.

Compared to both Veni and Cherur, where individual behavior was oriented toward the interactive community context, in Kembu it was the family, particularly the nuclear household rather than the community at large, that formed the effective social group. Thus, the emphasis here was on the reproduction of this unit. This accounts for the stress on accumulating family wealth and professional qualifications. The focus on the family was partly counteracted by the value placed on the importance of the religious community. Time and effort were often spent on religious activities upon return from the Middle East, which meant frequent interaction with fellow church members. However, since there were around twelve churches in Kembu (an area of approximately one and a half square miles), each had a fairly small congregation, thus affording only a very limited community context.

Although the ethnic structure of the community constrained how individuals used migrant remittances, it was in turn recreated by the affluence brought about by migration. Thus, at the time of my research, the Mappilas were moving from being an inward-oriented and anti-modern community to one which increasingly participated in the larger society. They were taking pride in adopting the dress styles of the Hindus and in taking over many of their rituals (particularly during the marriage ceremony). Having the latest consumer durables and “modern” building styles for their houses had become a matter of prestige. Religiosity had also become redefined in terms of “externals” (such as attending the mosque, sending children for extra religious instruction, and the ostentatious giving of charity) over the earlier practices of keeping to the five daily prayer times, strictly observing the Ramadan fast, avoiding alcohol, and following the other daily prescriptions and proscriptions given by Islam.

The Ezhavas had achieved a transformation in their economic and social status as a consequence of the migration. From being a poor community with few rights, and only a little above the slave castes, they had become an increasingly affluent section of society, rapidly becoming educated and politically powerful. They had also shed much of their caste stigma in the process and were becoming more confident, but also less cohesive. A new

ethnic identity was being formulated by the group, as evidenced by the changes introduced in the ritual sphere which symbolically represented the changed emphasis on class position, education, and occupational prestige over the traditional criteria of caste status.

The Syrian Christians, who had been a devout, hardworking, and frugal farming community, had turned to occupations in the tertiary sector, luxurious living, and a greater degree of individualism. All this brought about changes in their community identity. Their economic prosperity changed their earlier Puritan-like ethic to one which tended to be more complacently religious, judging their economic success as a sign of divine favor. With the deepening of the nuclearization process, the ties between extended family members (which were traditionally very strong) were being weakened.

6. Conclusion: Implications for Policy

I began this article with a discussion of two common patterns manifested by international return migrants – conspicuous consumption and lavish generosity. Although both these characteristics were manifested to some extent by all three communities, there were apparent differences between the areas in these respects. The crucial variables determining the extent to which the money was used for display and generosity seemed to be the degree of community feeling and competitiveness.¹¹ We have seen how the presence of a strong community ethic and a stress on cooperation in Veni led to a greater emphasis on donorship, while in Cherur, the presence of a strong competitive ethos together with a community context gave rise to a greater emphasis on conspicuous consumption. It is probably the greater individualism in Kembu that accounted for their low degree of conformity to the “typical” migrant model.

I have argued that consumption, investment, and exchange patterns are affected by two important variables: the way the income is obtained and the characteristics of the community within which the income is spent. Thus, in Veni, Cherur, and Kembu, similarities in the way in which income earned from international migration was perceived (as having some of the qualities of windfall or unearned income), together with the variation in the communities’ ethnic structures, account for the differences in the economic patterns of the three areas. In each case, it was the larger ethnic structure

¹¹ Engelbrektsson, who studied two Turkish villages which had a large migration to Europe found that it was the migrants from the highly stratified Yenikoy who manifested patterns of lavish consumption in an attempt to earn prestige in the society. The migrants from the more homogenous and cohesive Alihan did not do so (Engelbrektsson 1978).

and the definition of status in each community that conditioned the types of activities into which the money was channeled, the range of people who were the beneficiaries of migrant remittances, the patterns of reciprocity or charity practiced by the migrants, the selection of the trade-off point between community status and economic accumulation, and the groups of individuals who gained or lost economic control. At the same time, the economic resources and prestige gained through international migration and the sheer numbers of migrants involved gave the latter the opportunity to reformulate their own identity and that of the community.

The role of ethnicity in shaping patterns of migration and remittance use and the substantial variations in these patterns among the major communities in Kerala have generally not been recognized by the economists or policymakers who have been studying the impact of the migration on the state. Some studies of the Gulf migration in Kerala have documented a few of the community differences discussed in this article, but only in passing. For instance Raju Kurian (1978) conducted a comparative study in two villages – one near Kembu and another near Cherur – and noted significant differences in the educational and economic backgrounds and migration patterns of the migrants from both regions. But he does not comment or explain the reasons for these differences. While Kurian does not reveal the religio-ethnic composition of the villages, from their location we can infer that one was largely Syrian Christian and that the other was largely comprised of Ezhava Hindu migrants. A statewide study documented differences in the economic and educational backgrounds of migrants from Muslim, Christian, and Hindu backgrounds (Nair 1986), and another large migration survey conducted in 1998 noted variations in the proportion of migrants among the different ethnic groups in Kerala (Zachariah et al. 1999). However, none of these studies pursue the implications of the variations or what it might mean for policy.

In general, the studies of the economic impact of Gulf migration on villages, districts, and Kerala as a whole have largely proceeded on the assumption that there was a “generic” migrant. Most of the studies and the questionnaires were designed on the assumption that the migrant went on a legal contract for a particular job and a fixed salary, that he remitted the entire amount saved to his immediate family on a monthly basis, and that this monthly remittance represented the total monetary benefit gained through the migration.¹² Again, consumption patterns of migrant

¹² Thus there were questions on the type of job, monthly earnings, as well as the monthly or annual remittances (see Government of Kerala 1987; Commerce Research Bureau 1978; Prakash 1978; Radhakrishnan and Ibrahim 1981). Saith in his paper on the impact of the invasion of Kuwait on remittances to Kerala, calculates: “Assuming that 75 percent of the total of 181,000 Indians in Iraq

households were examined through questions which asked how much of the monthly income was spent on fixed categories such as food, clothing, fuel and light, education, and “other” (see Government of Kerala 1987; Prakash 1978). In trying to determine the manner in which remittances were used, some studies (e.g., Commerce Research Bureau 1978) looked at the physical asset position but excluded the financial.¹³ From the material presented in this article, it should be obvious that the design of these studies missed crucial variations among groups, and also that the economic behavior of few of the migrants or their households could be captured by these categories. Finally, to get an idea of the total remittances earned by the state, one of the main indicators taken was the amount of foreign currency that was received by banks. But I have pointed out that in areas like Veni, most of the remittances were sent through illegal channels which were not included in the official estimates. In Cherur, the money was sent in the form of postal drafts which also would not have been counted by these estimates. Since more than half of the migrants from the state were Muslims and 13 percent were Ezhavas (Zachariah et al. 1999, 16) it is clear that only a small proportion of the remittances were sent through banks. Evidently the studies were inappropriately operationalized due to a lack of understanding of the way in which the Gulf migration took place in a majority of emigrant communities in Kerala. It is not surprising that conclusions and policy directives based on such assumptions were off-target. In the early period of the migration, economists and government officials had hoped that migrant remittances would fuel Kerala’s economic growth by stimulating its ailing industrial sector. When this did not take place, some tentative attempts were made to try to divert a part of the remittances to this sector. These attempts met with little success (see Nair 1989, 360). Few people seemed interested in such an investment, and with the chronic labor strikes in Kerala and the increased wage rates (due to the Gulf migration), industries based in the state were not competitive with those located in lower-wage areas of the country.

Studies focusing on the economic impacts of international migration have largely ignored the role of socio-cultural factors in shaping economic behavior. This chapter has argued that the use of migrant remittances is fundamentally affected by the way in which such remittances are

and Kuwait were workers... and that every worker on average sent home a monthly remittance of Rs. 3,000... the figure for the loss of remittances would be approximately US\$270 million per year” (Saith 1992, 108). Although Isaac (1993) discusses different types of Gulf migrants, he too falls into the trap of equating the “salaries” of the migrants with their total monetary gain from the migration.

¹³ The Commerce Research Bureau thus had the following categories: Land, Buildings, Jewellery, Radio, Car, Scooter, Cycle, Tape-recorder, Refrigerator, Total [value of these assets] (1978, 25).

perceived, the status-seeking activities of migrants, and the ethnic structure and values of each community. Governments, banks, and development organizations that seek to augment the developmental benefit of migrant remittances must recognize the importance of these factors for migrants and that “development” can be defined very differently by groups. Clearly, therefore, economists need to abandon the generic migrant model and design policies and investment opportunities that take group differences into account.

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