

Historical Political Economy of Migration

Volha Charnysh¹

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Abstract

Historical political economy is well-positioned to study the consequences of migration. This chapter summarizes insights from recent research in this field. To organize the findings, I separate the consequences of migration for receiving and sending societies and for migrants themselves. The economic impact of international migration on receiving societies has attracted the most attention in the literature, but scholars are increasingly emphasizing the political consequences of migration and its effects on sending countries. I discuss both voluntary and forced migration and emphasize important distinctions between them. I conclude by highlighting the advantages of studying historical cases and suggesting directions for future research.

Keywords: migration, immigration, emigration, refugees, forced displacement, cultural heterogeneity, integration, cultural diffusion, nativism, human capital

1. Introduction

The history of humanity is a history of migration. The first humans migrated out of Africa some 70,000-100,000 years ago, populating diverse environments and developing new cultures. In subsequent periods, migration became an important driver of social change. Encounters between people from different places accelerated innovation, trade, and institution-building, but also created competition and conflict. Migration continues unabated today, despite the growing number of restrictions on population mobility.

What are the consequences of migration for the receiving and sending societies? How does migration affect migrants themselves? Historical political economy (HPE) is well positioned to answer these questions. Because the effects of migration often unfold over generations rather than years and may change in magnitude or direction over time, looking deeper into the past allows for a more comprehensive understanding of migration phenomena. Moreover, from a methods standpoint, history can serve as a repository of cases and quasi-experimental designs for estimating causal effects of migration and studying specific causal channels through which migration operates.

¹ Massachusetts Institute of Technology. Department of Political Science. charnysh@mit.edu.

This chapter highlights insights from *recent* HPE work on migration, understood as the movement of people, either across international borders or within countries.² It is structured based on two broad distinctions that characterize this literature. The first concerns the subject of analysis: *receiving* societies, *sending* societies, or *migrants* themselves. The bulk of research examines the first – the effect of immigration on receiving societies – especially in relation to the Age of Mass Migration to the Americas. Within this large body of work, scholars have focused on economic as well as political and social effects – which I will discuss in turn. I then consider the smaller bodies of HPE work on the consequences of emigration for the sending countries and on migrants and their children, respectively. International migration is reviewed most extensively, but I also reference some related studies on internal migration.

The second broad distinction is between the two types of migration: *Voluntary* migration is typically understood to result from economic considerations; *forced* migration is produced by conflict, natural or man-made disasters, and state policy, though the boundary is not so clear-cut in practice.³ I discuss these two forms of migration side by side, but emphasize important distinctions between their consequences, particularly for migrants themselves.

The chapter concludes with a brief discussion of the advantages of drawing on historical cases and HPE methods for studying migration and suggests directions for future research.

2. Effects of migration on receiving societies

2.1 Economic effects of voluntary migration

The economic effects of migration are a dominant theme in HPE research. This work typically concludes that immigration is beneficial for economic development and that its effects persist for a long time. There are several distinct channels through which immigrants may benefit receiving economies, including the introduction of new skills, knowledge, and human capital; the diversification of skills and occupations; the increase in the size of the labor force; and the diffusion of cultural traits that improve economic performance. Migrants can also reshape the trajectory of economic development by introducing new institutions and cultural norms, and here the effects are more ambiguous. Both the size and the composition of the immigrant population matter.

Much of the empirical evidence on the economic benefits of immigration comes from the Age of Mass Migration (1850-1920) (see review in Abramitzky and Boustan 2017). This is not surprising given the magnitude of the phenomenon and the availability of linked data at the county and individual level, particularly for the United States. Some 55 million immigrants left Europe during this period, of whom nearly 30 million settled in the United States. The composition of immigration changed over time, as the arrivals from Southern and Eastern Europe increasingly outpaced those from Northern and Western Europe. Mass migration came to

² I also use the terms immigration (moving into, from the perspective of receiving countries or regions) and emigration (moving away, from the perspective of sending countries or regions).

³ Even in times of conflict and famine, only some people are able to emigrate; one may also debate whether leaving home to feed one's family is indeed a voluntary decision (Becker and Ferrara 2019).

an end when the US Congress imposed a literacy test (1917) and national origin quotas (1921, 1924) (Hatton and Williamson 1998).

Empirical research suggests immigration had both immediate and long-term economic benefits. Sequeira, Nunn, and Qian (2020) offer one of the most comprehensive treatments of the economic effects of the *size* of immigrant population in the United States. Instrumenting for the share of immigrants at the county level with an interaction of railway access and aggregate immigration to the United States, they find that immigrants increased the supply of labor for industrialization and provided new skills and knowledge that raised innovation and agricultural productivity. These initial benefits persisted over time, as evidenced by higher income, educational attainment, and urbanization as well as lower poverty and unemployment rates today in counties with historically higher immigration.

Other studies find similar results using alternative identification strategies and outcome variables. Tabellini (2020a) shows that immigration increased natives' employment and industrial production in US cities in the short run. Focusing on the long-run impact, Rodríguez-Pose and von Berlepsch (2014) show that immigration predicts higher GDP per capita in 2005; they argue that immigration created a culture of entrepreneurship, ambition, and risk taking. Akgigit, Grigsby and Nicholas (2017) demonstrate that immigrants were more likely to file patents in 1880-1940, accounting for a higher share of inventors than their population share, and that areas where foreign-born expertise was more prevalent experienced faster growth in 1940-2000. Researchers also find that the imposition of immigration quotas in the 1920s lowered earnings of US-born workers (Abramitzky, Boustan, and Eriksson 2019) and reduced rates of innovation (Moser and San 2020).

One of the advantages of focusing on the United States during the Age of Mass Migration is the heterogeneity of immigrants' skills and countries of origin, which allows us to investigate whether the *composition* of immigrant population matters. Using a panel dataset from 1850 to 2010, Fulford, Petkov and Schiantarelli (2020) find that migrants from countries with higher economic development, greater generalized trust and cooperation, and longer histories of stateness had a larger positive effect on GDP per worker.⁴ Ager and Brückner (2013) demonstrate that the diversity of immigrants enhanced the variety of skills and occupations, which resulted in more diverse goods and services. They construct both fractionalization and polarization indices based on immigrants' countries of origin in 1870-1920, showing that a within-county increase in the diversity of the migrant population increases output per capita, while a within-county increase in polarization decreases output per capita.⁵

⁴ This study builds on work by Putterman and Weil (2010), who construct a matrix of world migration between 1500 and 2000 for 165 countries that links the ancestry of each country's population groups to this group's history of stateness and the timing of agricultural transition. The authors also find that countries with a population whose ancestors have earlier histories of stateness and transitioned to agriculture earlier have higher GDP today and interpret this as evidence for the importance of human capital.

⁵ Increases in cultural polarization also predict the growth of the tax ratio and the share of public sector officials, which they interpret as evidence of distortionary taxation and excessively large government size due to conflict between immigrants of different origins (Ager and Brückner 2013).

Scholars also find that mass immigration from Europe spurred economic development in South America, where state governments often purposefully invited European settlers. Research on this region typically emphasizes immigrants' higher human capital as the primary causal channel. Droller (2018) shows that the arrival of European immigrants in 1869-1914 raised GDP per capita in Argentina; he argues that Europeans were on average more literate and brought knowledge and skills useful for industrial development. Focusing on Brazil, Rocha, Ferraz, and Soares (2017) find that the government-sponsored settlement of Europeans, who had higher human capital, shifted the occupational structure toward skill-intensive sectors such as manufacturing and increased the supply of educated labor, raising per capita income in the long run. De Carvalho Filho and Monasterio (2012) likewise find that Brazilian municipalities closer to 19th-century European settlements had higher per capita income, less poverty, and better health and education outcomes today. However, they argue that more egalitarian distribution of land in European settlements was more important than human capital for explaining these beneficial effects.

Inviting high-skilled immigrants to benefit from their human capital has been common among governments throughout history.⁶ One of the earliest examples analyzed in HPE is the 1685 Edict of Potsdam, which invited the Huguenots, persecuted for their religion in France, to settle in Prussia. Hornung (2014) takes advantage of the fact that few alternative communication channels existed in this historical period to isolate the effect of immigration on the diffusion of knowledge. He finds that the Huguenots, who were more skilled than the local population, increased the productivity of textile manufacturing and that their economic impact was still visible a century later. In Russia, Catherine the Great invited European (predominantly German) immigrants in the late 18th century hoping to stimulate “development and growth of many kinds of manufacturing, plants, and various installations” (Deutsche Welle 2013). Natkhov and Vasilenok (2019) show that German settlements fulfilled her expectations, increasing labor productivity in agriculture by spreading the adoption of heavy ploughs and fanning mills. They also increased wheat production among Russian peasants, who traditionally sowed rye. Lankina (2012) shows that European settlers also raised literacy rates among other population groups. Russian tsars also encouraged settlement of the Russian Orthodox population in its frontier territories, to secure control over the regions populated by other ethnic groups. Natkhov (2015) finds that 19th century Russian settlements in the North Caucasus increased literacy among the indigenous population, which led to higher incomes, educational attainment, and quality of governance in the long run.

Immigrants may also benefit receiving economies by creating stronger ties with their countries of origin and providing information about overseas markets. Their presence reduces transaction costs for cross-border trade and investment. Burchardi, Chaney, and Hassan (2019) argue that the ancestry of US population dating back to the Age of Mass Migration affects the information about specific overseas markets and thus shapes the direction of foreign direct investment (FDI) sent and received by local firms today. Relatedly, Burchardi and Hassan (2013) show that regions in West Germany that received more refugees from East Germany between 1949 and 1961 experienced faster growth of income per capita after the fall of the Berlin Wall in 1989, as these migrants benefitted from

⁶ State sponsorship often imparted significant economic advantages to the immigrant settlements, which can complicate the estimation of the contribution of immigrants' human capital.

preexisting social ties to seize new economic opportunities in East Germany. The trade channel remains relatively understudied in HPE.

Finally, immigration may alter formal and informal institutions in the receiving societies, setting them on a different economic trajectory. First, immigration may change social relationships, resulting in the development of new governance mechanisms. Acemoglu, Johnson, and Robinson (2001) famously credit settler colonization with the creation of “development-minded” institutions that produced economic growth.⁷ Using evidence from Indonesia, Pepinsky (2016) argues that migrant settlement may produce new subnational patterns of economic governance. He shows that Chinese migrants experienced greater social exclusion and thus relied on cooperation with local political elites for protection; the resulting informal relationships shaped the accommodativeness of economic governance to firm interests and persisted over time. Immigrants also bring norms and values from their places of origin, which have been shown to persist in a new environment for several generations and diffuse to the native population (e.g., Grosjean 2014; Bracco, De Paola, and Green 2015; Charnysh and Peisakhin 2022; Miho, Jarotschkin, and Zhuravskaya 2020). In principle, this “cultural baggage” may undermine the functioning of formal and informal institutions in the receiving societies, with implications for economic growth, although there is little evidence to support this channel for both historical and contemporary cases (Nowrasteh and Powell 2021).

Taken together, the empirical evidence reviewed above suggests that immigration benefits the receiving economies. The benefits are largest for high-skilled, better-educated immigrants from counties at higher levels of economic development. Human capital received more attention than other causal channels, possibly because it is easier to quantify.

2.2 Economic effects of forced migration

Does it matter whether migrants are forced or voluntary? Forced migrants experience psychological trauma and property loss that may lower their economic productivity. They lose ties to their places of origin, which may reduce opportunities for economic exchange. Their legal status is often uncertain and impermanent, which may delay integration (Becker and Ferrara 2019). Forced migrants also have less control over their destinations, which may lead to occupational mismatch and delay economic integration (Braun and Dwenger 2020). Notwithstanding these features, studies have found that forced migration benefited receiving economies in the long run.⁸ This was the case not only for smaller groups of refugees with superior education and skill levels, such as the French Huguenots in Prussia (Hornung 2014) and the German Jewish scientists in the United States (Moser, Voena, and Waldinger 2014), but also in cases of mass displacement of populations that were relatively similar to the natives or arrived from less developed regions.

⁷ Alternatively, scholars argued that European settlers’ human capital explains higher levels of economic development in settler colonies (e.g., Glaeser et al. 2004).

⁸ In the short run, one study found that the arrival of expellees in West Germany after WWII reduced employment of the population in high-inflow regions (Braun and Mahmoud 2014). The expellees also increased the burdens on local budgets because they were disproportionately dependent on welfare in the immediate postwar period (Chevalier et al. 2019).

In the aftermath of the Greco-Turkish War of 1919-1922, 1.2 million Orthodox Christians from Turkey were resettled to Greece and 350,000 Muslims from Greece were resettled to Turkey. Murard and Sakalli (2018) find that Greek municipalities that had received more refugees in 1923 had higher average earnings, a larger manufacturing sector, and higher night light luminosity in 1991. Both high- and low-skilled refugees improved subnational economic outcomes, though the effects were larger for the former. The authors theorize that refugees brought complementary skills that fostered long-run growth by facilitating technology transfers and increasing agricultural know-how.

Population transfers on an even larger scale occurred after WWII. Some 12.5 million Germans and 5 million Poles were resettled following changes to the Polish and German borders in 1945. In Poland, Charnysh (2019) shows that localities populated by forced and voluntary migrants from more heterogeneous regions achieved higher entrepreneurship rates and incomes than localities populated by more homogeneous migrant populations after Poland's transition to a market economy, even though they were economically similar during state socialism. She argues that the benefits of diversity that come with immigration are conditional on the nature of state institutions. In West Germany, Braun and Kvasnicka (2014) demonstrate that expellees' arrival accelerated the transition away from agriculture and increased output per worker in the short term. They propose that, as a result, the expellees had lower costs of switching from one occupation to another and were more responsive to growing economic opportunities in the manufacturing sector than the native population. Focusing on Bavaria, Semrad (2015) shows that the inflow of German expellees from industrialized Sudetenland (Czechoslovakia) generated educational spillovers, increasing the human capital of the natives. Charnysh (2022) traces the effects of German expellees in West Germany on subnational economic outcomes over a longer time period, showing that places with a larger and more heterogeneous refugee population experienced a reversal of fortunes over time. Although expellee presence initially created economic challenges for receiving counties and municipalities, both the share and heterogeneity of expellee population increased education levels and entrepreneurship rates over time.

The partition of British India displaced nearly 18 million people in 1947-51, changing the demographics of the population in affected districts (Bharadwaj, Khwaja, and Mian 2014). Bharadwaj and Mirza (2019) show that Indian districts that received more refugees increased their agricultural yields, took up more high-yielding varieties of seeds, and used more tractors and fertilizers in 2009. They attribute this long-run economic benefit to the composition of incoming refugees, who had higher literacy rates than both the native population and the refugees leaving for Pakistan, as well as to the land reforms in districts affected by the population exchange.

To summarize, forced migration created significant short-term challenges, but benefited receiving economies *in the long run*, through some of the same mechanisms as voluntary migration, such as human capital, skill complementarities, and an increase in the size of the labor force. Importantly, in the three cases of mass population transfers the receiving governments – sometimes with the help of international organizations – responded to the arrival of refugees with redistributive reforms, financial aid, and other investments aimed at facilitating economic and political integration. Such active governmental support was less common in cases of voluntary immigration.

2.3 Political and social consequences of immigration

HPE research on the political impact of immigration is considerably smaller. Studies typically find that the arrival of immigrants increases nativism and reduces public investment in the receiving communities in the short run. The effects are more ambiguous in the medium to long run, as immigrants may have an independent effect on policy by voting and engaging in political activism, on the one hand, and by transmitting their values to the local population, on the other hand.

Opposition to immigration appears to be a common response in all historical periods. Even though immigrant presence benefited local economies, US cities that received more immigrants during the Age of Mass Migration saw greater tax cuts and reduction in the provision of public goods and were more likely to elect conservative politicians and support restrictions on immigration (Tabellini 2020a). Backlash against newcomers also occurred during the Great Migration, which brought approximately six million African Americans from the US South to Northern, Midwestern, and Western states (Boustan 2010, Shertzer and Walsh 2019, Tabellini 2020b). An increase in the share of Black residents induced “white flight” and lowered property values, which reduced public spending and tax revenues (Tabellini 2020b).

Nativist reactions were documented even in cases where migrants were ethnically and racially similar to the local population, such as West Germany and Poland after WWII (Charnysh 2022). Braun and Dwenger (2020) show that the anti-immigrant Bavarian Party secured more votes in districts with a higher share of German expellees as well as with the greatest religious distance between expellees and natives. The arrival of expellees also reduced local tax rates, as the native population was less willing to contribute to the local budget. Charnysh (2022) finds that tax rates on property and business, disproportionately owned by the native population, decreased with the share of expellees in municipalities where natives still dominated the local council. However, the relationship between the share of expellees and tax rates was positive in municipalities where expellees were in the majority, a sign of political polarization between two groups and the unwillingness of natives to contribute to local budgets following the arrival of refugees. Conversely, Chevalier et al. (2019) demonstrate a positive relationship between the share of refugees and tax rates for cities, which received relatively few expellees. Divergent findings between these two studies suggest the effects of migration on fiscal policy may depend on context: cities were historically more diverse and also experienced more destruction during WWII; the smaller numbers of expellees that settled there were less likely to stand out culturally or economically.

Counterintuitively, nativist concerns about immigrants can give rise to progressive reforms that increase public spending. Bandiera et al. (2019) show that US states that hosted European immigrants without exposure to compulsory schooling in their home countries passed compulsory schooling laws significantly earlier in order to teach civic values and discipline immigrants’ children. Relatedly, Kevane and Sundstrom (2014) demonstrate that greater diversity of the immigrant population during the Age of Mass Migration contributed to the expansion of public libraries, perceived as a way to assimilate and/or control immigrant groups.

In this way, the natives' apprehension about immigrant assimilation had incentivized nation-building and increased human capital in the long run.

Migrants often have different political preferences from the local population and may influence policy once they become eligible to vote. Giuliano and Tabellini (2020) find that European immigrants to the United States (1910-1930) brought greater support for the welfare state from their countries of origin and transmitted their values to the native population. They credit immigration with support for the Democratic Party and the New Deal. They also show that survey respondents in counties with higher historical immigration are today more likely to support welfare spending, the minimum wage, and higher taxes for financing fiscal deficits.

How do we square this conclusion with evidence from Tabellini (2020a) that immigration reduced public spending in cities? The short- and long-run effects of immigration may be different: opposition to redistribution and intolerance among the natives may decline as they become more accustomed to diversity and have more contact with outgroup members (Ramos et al. 2019, Christ et al. 2014), and as migrants' values diffuse to the native population over time. Calderón, Fouka, and Tabellini (2019) find some evidence for the diffusion of more tolerant values from immigrants to natives using data from the Great Migration of African Americans. They find that changes in racial composition of US counties during this period increased local political support for civil rights legislation and racial equality, not only among Black but also among White voters. At the same time, Black immigration increased polarization along party lines, inducing Democratic legislators in already Democratic districts to become even more supportive of civil rights and increasing conservative positions among the Republican Congress members. Other studies emphasize the channel of intergroup contact and social learning. For example, Fielding (2018) argues that the positive effect of contact with medieval Jews in the UK had lasting effects on tolerance and predicts more positive attitudes toward immigrants today.

These findings are important because concerns that migrants may undermine social capital and increase social conflict in the receiving communities are prominent in contemporary debates about immigration. HPE scholars are well positioned to contribute to this debate by investigating how long anti-immigrant backlash persists and what policy interventions can mitigate it. Preliminary evidence from historical cases suggests that immigration leads to the adoption of more tolerant norms and progressive policies over time.

Another question for future research is how immigration affects state capacity. As societies become more diverse, transaction costs increase and more formal enforcement mechanisms are needed to support cooperation. Using data from post-WWII Poland, Charnysh (2019) argues that cultural heterogeneity that comes with migration increases the demand for formal enforcement and may lead to the strengthening of state capacity over time. Does immigration affect investment in governance mechanisms in other contexts?

3. How emigration affects sending societies

Migration also has important economic and political consequences for places migrants leave behind, and in recent years scholars have devoted more attention to this question (Kapur 2014). Emigration may advance economic growth through remittances, technological change, and the

return of more skilled workers. It may also have negative economic consequences due to “brain drain” and the reduction in the labor force. On balance, studies found that voluntary emigration is more likely to benefit sending economies than forced emigration. Emigration may also affect political outcomes by creating an outside option for the domestic population, changing the distribution of economic resources, and diffusing new ideas and information.

The most straightforward immediate consequence of large-scale emigration is the reduction of labor supply, which may benefit those who stay by reducing competition. The effect may also vary depending on the characteristics of those who leave. Scholars have argued that emigration of low-skill labor from Europe during the Age of Mass Migration increased real wages in the sending countries and contributed to the convergence of income between the Old and the New World (e.g., Ljungberg 1997; Hatton and Williamson 1998; Enflo, Lundh and Prado 2014). By increasing the costs of labor, the decrease in labor supply may also encourage the adoption of labor-saving technologies. Andersson, Karadjia, and Prawitz (2021) show that mass emigration from Sweden in the late 19th century increased the number of patents and accelerated the adoption of new technologies in labor-intensive industries. Relatedly, Coluccia and Spadavecchia (2021) find that the 1921 immigration quotas in the United States increased labor supply in Italy, reducing incentives for the adoption of labor-saving technologies, such as the electrical engine.

The effects of the reduction in labor supply and population overall are likely to vary by historical period and institutional environment. Chaney and Hornbeck (2016) study the effects of the expulsion of Muslims (Moriscos) from Spain in 1609, during the Malthusian era characterized by diminishing returns to labor. They find that the population levels in districts where Moriscos used to live did not recover for at least 177 years and that the reduction of population produced an enduring increase in per capita output. Such slow rates of convergence may be due to the persistence of extractive institutions established in Morisco-dominated districts after the expulsions. In post-WWII Europe, under a different set of political institutions, the consequences of mass expulsions were the opposite. Testa (2021) shows that the expulsion of three million Germans from Czechoslovakia at the end of WWII had persistent negative effects on population density, human capital, and sectoral composition of the economy using geographic regression discontinuity design to compare areas that experienced mass expulsions with areas just across the border that did not. Reasons for this pattern are complex, as migrants from other parts of the country replaced the German population of the affected districts. The expulsions were also accompanied by violence and destruction of physical capital. These features characterize most cases of forced emigration, making it more challenging to isolate a specific causal mechanism.

Emigration of the highly-educated population may have negative consequences for the countries of origin, particularly when it is involuntary. Researchers have shown that the flight of Jewish teachers and professors from Germany and Austria during the 1930s reduced education levels (Akbulut-Yuksel and Yuksel 2015) and undermined economic success of university students (Waldinger 2010). The removal of Jewish managers in Nazi Germany lowered corporations’ stock prices, dividends, and returns on assets (Huber, Lindenthal, and Waldinger 2021). However, voluntary emigration of the educated population can also increase the returns to education and encourage investment in human capital by those who stay behind. Fernández-Sánchez (2021) finds support for this mechanism in the case of emigration from Spanish Galicia to Latin America in early 20th century. He shows that although emigration reduced literacy rates

in the short run, within ten years the effect turned positive. These gains in human capital in municipalities with higher emigration rates have persisted to this day.

Voluntary emigration may also influence sending economies through the channel of financial remittances. The flow of money across borders not only benefits emigrants' families, but also influences the development of financial institutions in countries of origin. Esteves and Khoudour-Castéras (2011) show that the demand for financial services and increased availability of capital in pre-1914 Europe contributed to the emergence of new domestic banks specializing in remittance activities; gave rise to reforms that encouraged channeling remittances through official financial institutions; and accelerated the expansion of the post office network in rural areas.

Large-scale emigration may affect the demand for political change directly, by providing outside options to potential emigrants, or indirectly, through financial or political remittances. Building on Hirschman's seminal framework of exit and voice, Sellars (2019) argues that the presence of exit options reduces political mobilization in contexts where collective action is risky and large-scale participation is necessary to effect change. She supports the predictions from a formal model using evidence from post-revolution Mexico and 20th-century Japan. In a book manuscript, Sellars (2022) shows that Mexico's land reform initially lagged in areas with high emigration, but the trend reversed after the Great Depression, an exogenous shock that halted emigration to the United States. Conversely, Karadja and Prawitz (2019) argue that easier access to emigration increased the bargaining power of those who stayed behind vis-à-vis the local elites in Sweden during the Age of Mass Migration. They find that residents of municipalities with greater rates of emigration were more likely to join the labor movement, participate in strikes, turn out to vote, and cast ballots for the left. Through these mechanisms, emigration increased welfare spending and led to the introduction of representative democracy in local governments. Walter (2019) observes similar patterns for internal migration using a panel dataset of Swiss cantons in 1930-75.

There is a large literature that suggests that financial remittances may bring about political change in autocracies, but it is based primarily on contemporary data (e.g., Escribà-Folch, Meseguer, and Wright 2019). The diffusion of norms, values, and resources from emigrants to their places of origin is another possible channel through which emigration can bring about political changes (Krawatzek and Müller-Funk 2020). Historical cases are particularly useful for estimating the impact of political remittances because there were fewer spillover effects between countries before the revolution of communications and information technology.

Migrants also influence politics in sending societies when they return. The rates of return are non-trivial. For instance, during the Age of Mass Migration, up to 60-75% of European migrants are estimated to have returned (Bandiera, Rasul, Viarengo 2013), bringing new capital, knowledge, and transnational connections to their places of origin. The political effects of return migration can be significant even when migrants comprise a small proportion of the sending population. Aggarwal, Chaurey, and Suryanarayan (2022) demonstrate this by studying indentured migration from India to the British colony of Natal. They argue that migrants were exposed to new political ideas, which led them to challenge the status quo at home upon return. They show that sending districts experienced higher turnout and more competitive elections and

that this effect was largely driven by migrants from intermediate castes, which were historically marginalized and were more likely to fight for political recognition.

Divergent findings on the economic and political impact of emigration on sending countries speak to the importance of institutional context and the nature of migration. HPE scholarship needs to devote more attention to understanding the role of contextual variables and specifying scope conditions under which a specific empirical pattern holds.

4. Effects on migrants themselves

There is also a growing literature on the effects of migration on migrants themselves. The distinction between forced and voluntary migration is particularly important here. Voluntary migrants have more agency regarding the decision to migrate, the choice of destination, and the possibility of return. Understanding how migration affects migrants requires addressing selection at multiple stages.⁹ Selection is somewhat less problematic for cases of forced migration: forced migrants are forced to leave and cannot return; they also typically have little control over the destination. The individual effects of forced migration are likely to differ significantly from the effects of voluntary migration because forced migrants experience violence and lose their possessions and political rights. Forced migration thus amounts to “a more life-changing experience” than voluntary migration (Becker and Ferrara 2019).

Research on voluntary migration suggests that migrants gain in some domains but lose in others. Migration can improve economic opportunities for migrants and their children. For instance, Abramitzky, Boustan, and Eriksson (2012) find a large positive return to migration in the late 19th century by comparing Norwegian immigrants in the United States with their brothers in Norway. To overcome the selection bias, they match men from both countries by name and age and assign each individual mean earnings for their occupation in the relevant country. Similarly, Collins and Wanamaker (2014) identify large gains in earnings for Black Americans who moved to the North during the Great Migration in the United States, which reflects both changes in occupations (a tendency to move into higher paying jobs) and changes in locations (within occupations, pay in the North was higher than in the South). To deal with selection, they compare men from the same county or household of origin and conduct “within-person” analyses. Using data linked from 1940 to 2000, Alexander et al. (2017) find gains in education, income, and economic status for the children of African Americans who moved, relative to the children of African American parents who remained in the South.

Economic benefits notwithstanding, the stresses of relocation to a new environment as well as a “cold welcome” from the local population may take a toll on migrants’ health. Black et al. (2015) show that migration out of the South reduced longevity of African Americans, despite both positive selection of immigrants and economic and social improvements upon migration. They hypothesize that this negative outcome is due to discrimination in housing and employment as well as detrimental behaviors (smoking, drinking) after the relocation. Relatedly, Eriksson and Niemesh (2016) show that Black infant mortality rates increased following migration to the North. There are additional disadvantages that may come with migration in the presence of

⁹ This is also an important concern for studying the effects of migration for sending and receiving countries.

economic insecurity and discrimination in the labor market. Compared to brothers who stayed in the South, African American men who moved were more likely to be incarcerated (Eriksson 2019, Derenoncourt 2019).

It stands to reason that economic gains will be smaller and the detriment to health greater for forced migrants. The long-term economic implications depend, in part, on migrants' strategies following the loss of income, community, and economic status. Bauer, Braun and Kvasnicka (2013) show that both first- and second-generation expellees in West Germany were economically worse off than the native population 25 years after the resettlement, even though they were economically similar just before the war. Displacement also reduced incomes, increased unemployment and increased blue-collar employment. One exception is displaced agricultural workers, who left low-paid agriculture and experienced income gains. At the same time, the authors find that the children of expellees acquired more education, possibly as a strategy to compensate for the loss of wealth. Becker et al. (2020) find similar effects of displacement on human capital in Poland. They argue that refugees responded to the loss of physical assets by increasing investment in education. Using data from post-WWII displacement in Finland, Sarvimäki, Uusitalo and Jäntti (2020) find that forced migration from the region annexed by the Soviet Union increased transitions to non-agricultural occupations, which in turn led to a large increase in long-term income among the displaced population. In one of the rare studies that focuses on displaced women, Lu, Siddiqui, and Bharadwaj (2021) show that uprooting during the Partition of India and Pakistan increased the rates of early marriage and the number of children women had and decreased their educational attainment.

Forced migrants also experience physical and psychological trauma, which can undermine their health and reduce their longevity. Post-WWII German expellees in West Germany had a higher mortality risk in old age (Bauer, Giesecke and Janisch 2017). Finns uprooted by the Soviet invasion had a higher risk of death due to heart disease (Haukka et al. 2017).

There is also some evidence that forced migration shapes the political attitudes of the affected individuals and their descendants. Menon (2021) argues that the violent process of expulsion and discrimination at the destination increased support for the far right among German expellees. He uses electoral data from West Germany to show that the far right secured more votes in districts that received more expellees after WWII. Using a multigenerational survey, Lupu and Peisakhin (2017) show that the descendants of the Crimean Tatars who suffered more intensely during the deportation from Crimea had stronger ingroup identity, more hostile attitudes toward the perpetrator nation (Russia), and greater rates of political participation. At the same time, there is some evidence that the experience of mass displacement makes refugees and their descendants more empathetic to the plight of others. In particular, Dinas, Fouka and Schläpfer (2021) show that priming family history of forced migration increases sympathy toward refugees in contemporary Greece and Germany.

Separating different channels through which migration shapes attitudes and behavior can be challenging and requires considering not only the experience of migration, but also characteristics of the receiving communities. This is an important direction for future research.

5. The advantages of relying on historical cases

The studies reviewed here not only advance our understanding of the multifaceted effects of migration, but also highlight distinct advantages of using historical cases and HPE methods. First, the effects of migration typically unfold over a long time horizon and may persist for more than a century (e.g., Sequeira, Nunn, and Qian 2020; Karadja and Prawitz 2019; Chaney and Hornbeck 2016; Hornung 2014). For individuals, the effects of migration unfold over generations rather than years (e.g., Abramitzky et al. 2021; Alexander et al. 2017; Lupu and Peisakhin 2017). Extending the temporal lens also reveals that the impact of migration may change in magnitude and direction over time (e.g., Fernández-Sánchez 2021; Ramos et al. 2019), particularly when the institutional environment changes (e.g., Charnysh 2019; Burchardi and Hassan 2013). Adopting a longer perspective thus allows for a more comprehensive and accurate evaluation of the impact of migration.

Second, historical cases can be useful for addressing endogeneity issues. Selection bias, which can enter at different stages of migration, is one of the main concerns when estimating the economic and political consequences of migration. It is sometimes possible to address selection by drawing on historical cases and using quasi-experimental designs. Virtually all studies referenced in this chapter seek to identify the causal effects of migration. Some of the most common approaches are instrumental variables, including the variation on the shift-share instrument (e.g., Tabellini 2020b), and difference-in-differences estimation that compares locations before and after changes in the volume of migration (e.g., Coluccia and Spadavecchia 2021).

Relatedly, focusing on historical periods when migration was relatively less regulated can illuminate the process of selection into migration itself. Whereas today the US relies on a patchwork of legal restrictions that distinguish between migrants on the basis of skills, country of origin, and family background, it maintained relatively open borders until the 1920s. This has allowed researchers to study the decisions to emigrate and to estimate economic returns to immigration (e.g., Abramitzky, Boustan, and Eriksson 2012; Connor 2019). History can also serve as a repository of case studies for studying the effects of various types of restrictions on immigration on both sending and receiving communities (e.g., Moser and San 2020; Abramitzky, Boustan and Eriksson 2019).

Finally, historical data are sometimes more fine-grained and detailed than contemporary data. This is the case, for example, for personal information that may be closed to research to protect individuals involved. In the US, individual census records are released to the public 72 years after the day of the census. This means that the 1950 (earliest) census microdata became available only in April 2022. Microdata up to 1940, on the other hand, is freely available from IPUMS USA. Other countries have similar restrictions. Access to personal data is particularly important for research on migrant selection and assimilation and on the effects of migration on migrants and their children (e.g., Abramitzky, Boustan, and Eriksson 2012; Eriksson 2019; Escamilla-Guerrero, Kosack, and Ward 2021).

6. Conclusion: Directions for further research

HPE literature on migration is vast, but blind spots remain. There is significantly more research on the receiving societies than on the sending societies and on migrants themselves. In addition, while the economic effects of migration are increasingly well-understood, there is less work on its political and social consequences. It is important to ask how migration affects the quality of political and economic institutions, whether it facilitates or impedes nation- and state-building, and whether the effects of immigration on tolerance and social cohesion change over time. These relationships are harder to investigate, but arguably more important because they mediate the effects of migration on economic outcomes. For example, discriminatory policies in the receiving countries affect the jobs immigrants take and how much they interact with the native population, which in turn mediates their contributions to local economies.

Much of what we know about the effects of immigration comes from the US during the Age of Mass Migration – an important but atypical case given its origins as a settler colony. It is possible that immigration will have different social and political consequences in states where the population is more ethnically homogeneous and less geographically mobile. The economic benefits of immigration under extractive institutions or in weak states may also be smaller. Exploring the consequences of historic migration in other contexts, including China, Africa, and the Middle East, might provide new theoretical insights.

More broadly, the HPE of migration would benefit from integrating findings from different country cases into a more general theoretical framework. Much of the existing work addresses narrow empirical questions using subnational data from a specific historical period. There are significant identification and measurement advantages to this approach, but the knowledge it generates does not necessarily aggregate to a general theory and may not apply to other settings. The biggest takeaway from studies reviewed here is that context matters: the political and economic effects of migration in one setting may be the exact opposite to its effects in another setting.

Few theories are likely to hold universally, but it is important to integrate information from these disparate projects into a broader framework and begin specifying the conditions under which a specific empirical pattern or causal channel applies. Understanding how the effects of migration vary with political institutions and the level of economic development at origin and destination, as well as with the nature of migration itself, is particularly important for extending the lessons from historic cases to contemporary immigration.

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